WAYS OF USING EXCESS SCHOOL SPACE

FINAL REPORT

prepared by
COMMUNITAS INC
and
LARRIE TAYLOR ARCHITECT LTD
under contract to

ALBERTA EDUCATION, EDMONTON, ALBERTA

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Communitas Incorporated, and
Larrie Taylor Architect Ltd.,
#200, 10123 - 112 Street,
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January 15, 1982

Leigh Hill, Associate Director
Planning and Research Branch
Alberta Education
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Edmonton, Alberta

Dear Mr. Hill,

We are pleased to submit herewith the Ways of Using Excess Space Study Final Report.

This report presents the results of our research completed during a three stage study into the extent, nature, and possible solutions of the problem of excess school space as it is experienced in Alberta, particularly in the Edmonton R.C. Separate School District #7.

Stage I of the study reviewed the experience of other jurisdictions, analyzed population and enrollment trends, inventoried excess and potential excess space within the Edmonton Separate School District, and identified potential supplementary uses and constraints to such uses.

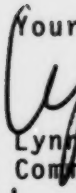
Stage II of the study developed strategies for the planning and management of excess school space within the Edmonton Separate School District. It also presented some suggestions for methods of addressing the various constraints to supplementary use of excess space identified in Stage I.

Stage III is presented in two parts. Part 1 discusses research done for Stages I and II for Alberta Education's policies and programs as they affect local school boards' abilities to manage their excess school space, as well as direct recommendations to school boards and municipalities. Part 2 of the Stage III Interim Report presents the salient features of this study in a form designed particularly for wide public dissemination, and particularly for the use of local school boards in addressing their own problems of excess space management.

This final report consolidates the material presented in the three interim reports. Chapter One presents the results of our study of the experience of other jurisdictions. Chapters Two and Three present the case study of the Edmonton R.C. Separate School District # 7, and the strategies developed for that school board to address its particular excess space problems. Chapter Four, finally, presents our recommendations to school boards in general, to municipalities, and to Alberta Education for action in respect to excess school space. A summary report, under separate cover, highlights the major recommendations of the study, and summarizes the overall findings.

In conclusion, we wish to thank the Ways of Using Excess School Space Steering Committee for their assistance throughout the entire study, and the Study Task Committee set up by the Edmonton Separate School Board for their assistance in preparation of the Stage II report. In particular, we wish to thank Mr. W. P. Pasternak, Mr. Ralph Omoe, and other staff of the E.S.S.D. for their assistance in gathering the necessary information for this report, and yourself, for your assistance and guidance in your role of Chairman of the Steering Committee for this study. Finally, we wish to thank the many people--educators, administrators, people now using school space for supplementary uses, librarians--all those who made this study possible by contributing generously of their information and experience.

Yours truly,



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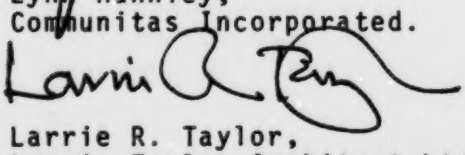

Larrie R. Taylor,
Larrie Taylor Architect Ltd.

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This report has been prepared under contract to Alberta Education and for the Edmonton R.C. Separate School District #7 by

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ABSTRACT

Communitas Incorporated and Larrie Taylor Architect Ltd. Ways of Using Excess School Space: Final Report. 128 p., Summary Report 41 p., 3 vol. appendices. January 1982.

This study, commissioned by the Edmonton R.C. Separate School Board together with Alberta Education, was designed to explore the problem of excess school space, particularly within the Edmonton Separate School District, and to make recommendations for action to the province, municipalities, and school districts. The study consisted of three stages:

Stage I
- reviewed the experience of other jurisdictions
- analyzed the population and enrollment trends in Edmonton
- identified the potential magnitude of the problem in the Edmonton Separate School District
- identified potential supplementary users
- identified constraints to conversion of school space to supplementary uses.

Stage II
- outlined a planning process for the Edmonton Separate School District.

Stage III
- consisted of 2 parts
- recommended, in Part 1, changes to provincial regulations and legislation, to municipal land use policies, and recommended an approach to school districts to facilitate the management of excess school space
- presented, in Part 2, an information package for school districts including information on the nature of the problem, and a proposed process to develop policies, plans, and programs for managing excess school space.

The final report consolidates the material prepared during the three stage study. The summary report highlights the major findings of the study in a form designed for wide public use.

OUTLINE: WAYS OF USING EXCESS SCHOOL SPACE

Purpose of Study: This study was designed to explore the problem of excess school space, particularly within the Edmonton R.C. Separate School District #7, to identify potential users of excess school space, to suggest methods of managing excess school space, and to make suggestions for action to the province, municipalities, and school districts to eliminate constraints to supplementary use of excess school space.

Problems Examined:

Stage I
- the experience of other jurisdictions
- the population and enrollment trends in Edmonton
- the magnitude of the potential excess school space problem in the Edmonton Separate School District
- requirements of supplementary users of excess school space
- physical, legal, economic, policy, and development constraints to the use of excess school space

Stage II
- requirements for successful excess space planning and management processes

Stage III
- solutions to constraints to use of excess school space

Scope of the Study: While the study examined the problem of excess school space as it is reported in education literature and in inventories conducted across North America, it focussed primarily on the situation as it exists in the Edmonton R.C. Separate School District. Recommendations drawn from the research are directed more generally toward the entire Alberta situation.

Research Methodology: This study was begun by an exhaustive review of available literature concerning excess school space, and use of school facilities for other than educational purposes across North America, to determine the history of the problem, to establish the nature of solutions considered effective elsewhere, to identify major elements/issues in dealing with the problem, and to identify sources for more detailed information gathering.

Information from selected school jurisdictions across North America was solicited through an initial inventory and subsequent detailed questionnaires.

Information about experience in Alberta was gathered by questionnaire and personal interview from school boards, and supplementary users and potential users of excess school space within the province, and particularly within the City of Edmonton.

Information concerning the acceptability of various types of supplementary use was obtained by questionnaires sent to community league presidents within Edmonton, and to area superintendents of the E.S.S.D.

Reviews of mechanical, electrical, and structural systems were carried out on-site in selected Edmonton Separate School District schools.

Reviews of building forms and designs were carried out on-site in selected Edmonton Separate School District schools.

Reviews of Province of Alberta Statutes and Regulations, municipal land use controls, and school board policies were conducted.

Information regarding the demographic and physical characteristics which might affect enrollments of a number of neighbourhoods was obtained through the development of a series of questions in conjunction with the City of Edmonton Planning Department that could be processed through their PRISM DATA FILES.

Major Sources of Data:

Alberta Education, School Buildings Branch
Alberta Housing and Public Works
City of Edmonton Planning Department, PRISM Data Files
City of Edmonton Real Estate and Housing
Edmonton Community League Presidents
Edmonton Public School District No. 7
Edmonton R. C. Separate School District No. 7
Public Works Canada
School districts across North America
Current and potential users of excess school space in Edmonton

RECOMMENDATIONS

I RECOMMENDATIONS TO SCHOOL DISTRICTS

A.1 RECOMMENDED that school districts with excess space or potential excess space develop a comprehensive strategy for the management of educational space and facilities.

B.1 RECOMMENDED that school districts adopt a decentralized approach to management, involving in a real and substantial way, all those affected by decisions about the use of school space. Such a decentralized approach is described in Chapter Three as a direction by design planning process.

C.1 RECOMMENDED that school districts use the School Needs Formula, or some modification of such, for the determination of potential effective excess space, recognizing that using a formula other than the Provincial Utilization formula may impose certain costs.

D.1 RECOMMENDED that a school district, using the School Needs Formula to determine its effective excess space, take into account the potential financial implications of possible underutilization of existing school facilities.

D.2 RECOMMENDED that while developing its strategy for the management of excess school space, the district consider ways of using its available facilities more efficiently, in order to provide adequate delivery of educational programs within available funding.

E.1 RECOMMENDED that the first step in a district's development of a strategy for the management of educational space and facilities, be the development and adoption of goals and objectives to guide that strategy.

II RECOMMENDATIONS TO MUNICIPALITIES

A.1 RECOMMENDED that municipalities adopt land use by-laws, which include as discretionary uses in land use districts which include school lands or buildings, any use which meets the general purpose of the land use district, which complies with any Statutory Plan, which is compatible with the character, form, and integrity of the neighbourhood, and which meets the criteria of a school's plan for supplementary uses.

B.1 RECOMMENDED that municipalities actively support school districts which pursue effective supplementary use programs, and further, that municipalities, where appropriate, enter into agreements with such school districts for provision of community facilities.

C.1 RECOMMENDED that municipalities offer to participate in the planning process adopted by a School Board to develop a strategy to manage excess space and that municipalities develop procedures to inform School Boards of any anticipated changes to plans and land use controls.

III RECOMMENDATIONS TO ALBERTA EDUCATION

A.1 RECOMMENDED that Alberta Education establish an information dissemination program with regards to planning and possibilities for the use of excess school space.

A.2 RECOMMENDED that Alberta Education become the clearing house for information about the experience of other jurisdictions in managing excess school space. Information gathered could include both general experiences and specific material, such as districts' goals and objectives for the use of space, leasing policies, marketing techniques, administrative procedures and documentation, nature and cost of modifications for different types of clients, etc. This information could be available, on a request basis or through a periodic information publication.

B.1.1 RECOMMENDED that Alberta Education establish a one year start-up program to enable a school district to plan for the use of excess space.

B.2.1 RECOMMENDED that Alberta Education, through its Planning and Research Division, establish technical support services for local school districts. Areas of service could include

- preparation or assistance with enrollment projections and analysis of enrollment patterns;
- advice on organizational structures for the planning process;
- information about techniques to encourage participation of affected parties, as well as planning process techniques and methodologies;
- analysis of existing facilities in terms of the adaptability and flexibility, suitability for educational programs, and implications of maintenance and upgrading requirements;
- identification and analysis of local and regional development trends;
- information on potential user requirements;
- information on marketing of excess space.

B.2. 2 RECOMMENDED that technical support services be provided to school districts without charge in year one of the district's program. In subsequent years, it is suggested that this service be charged to the districts on a use basis, and that the cost for the service be built into the annual lease/rental fees collected by the districts from supplementary users.

B.3. 1 RECOMMENDED that the Building Quality Restoration Program 1979-83 be extended to include the cost of modifications necessary to accommodate non-profit community based users who are unable to raise the capital necessary to cover the cost of such modifications. It is also recommended that the use of funds for this purpose be monitored, and if the need exists, the Program (for non-profit user modifications) be extended beyond 1983.

B.4. 1 RECOMMENDED that Alberta Education undertake a review of the problems and costs of reconversion prior to 1985, to determine whether there is a need for the development of a special program to assist with the reconversion of school facilities.

C.1. 1 RECOMMENDED that the following addition be made to the current regulation 71/77 pursuant to Section 93 (2.1) of The School Act:

A school district may lease or rent any real property or buildings or portions thereof for use by a user who

1) is acceptable to the school district, and

2) is acceptable to the municipality, meaning that the user is able to obtain the necessary development permits, and

3) is acceptable to the adjacent community, meaning that the user meets criteria established in a school's plan for supplementary use;

without having to obtain Ministerial approval.

C.2. 1 RECOMMENDED that Section 93 (7) be amended to include any of the users exempted by the Minister by regulation pursuant to Section 93 (2.1) of The School Act.

C.3. 1 RECOMMENDED that Section 3.(2)(e)(iii) be interpreted to mean any user exempted pursuant to the addition suggested above to Regulation 71/77 eliminating the necessity for prior Ministerial approval for disposition of any class of real property or land.

C.4. 1 **RECOMMENDED** that a school district leasing/renting excess space establish a special account for income and expenses with regard to the leased/rented space, and that the School Buildings Board only exercise its discretionary powers with regard to a reduction of financial support for a school buildings project, when and if it establishes that a district has unduly profited by the situation.

C.4. 2 **RECOMMENDED** that the School Buildings Board, in consultation with existing school districts, establish acceptable income/expense ratios to be used as the basis for determining undue profit.

C.5. 1 **RECOMMENDED** that Alberta Education consider establishing special class size standards for special programs such as ECS, TMH, EMH, etc., that take into account the particular nature and requirements of these programs.

INTRODUCTION

INTRODUCTION

Excess space, rarely a problem in the education systems of the 1950's and early 1960's, was rarely recognized as a problem until the late 1970's all across North America. Such was the case in Alberta. By the late 1970's, the school districts in the larger urban centres of Alberta, particularly Calgary and Edmonton, were experiencing declining enrollments, empty classrooms, partially filled facilities in some areas of their districts, and it was time to make decisions.

School districts began, usually on an ad hoc basis, to rent out vacant classrooms to a variety of supplementary users. In 1979, as an incentive to school districts renting excess space, Alberta Education began to recognize such leased spaces as legitimate deductions from a school's operational capacity. This had the effect of increasing the district's utilization factor, and hence, its potential funding for new capital projects. To date, however, this program has had few results. Since the use of excess space by supplementary users is relatively new to Alberta, Alberta Education and the Edmonton Separate School District #7 issued a proposal call for a study of the possibilities and problems with regard to the use of excess space. Larrie Taylor Architect Ltd. and Communitas Incorporated responded to the proposal call with a three stage study. The first stage included a review of the experience of other jurisdictions, an analysis of the current and projected excess space within the Edmonton Separate School District, an inventory of the potential users of excess space and their requirements, an analysis of the problems associated with the use of excess space by the potential users, and an overview of possible means of resolving the constraints. During the second stage, a five year plan for the management of excess space was developed for the Edmonton Separate School District #7. Finally, during the third stage, recommendations to facilitate the use of excess space were developed, directed toward school districts, municipalities and Alberta Education. An information package was prepared that could be distributed to school districts throughout the province.

In a sense, it may be said that each stage of this study has been undertaken from the point of view of a different part of the overall education system, or the potential user.

For example, much of the material in Stage I of the study represents an examination of excess space as a vehicle for users other than educational users; that is, it concentrates on an examination of the range of users which have been able to use excess space, of the potential users of excess space, of means of identifying the possible space available for such users, and of constraints to those uses and solutions to the constraints. Stage II examined the excess space problem from the point of view of the affected school board itself, and directly addressed the

need to be able to effectively plan and manage that space in the 'best' interests of the school system. Stage III consolidates the material from the first two stages, makes recommendations directed toward the school boards, municipalities, and to the Ministry of Education. Stage III also provides information materials with the view toward facilitating the use of excess space.

Because of the different perspectives and potentially different interests and objectives of the various groups, it became necessary to establish a rationale for the use of school facilities that would guide and direct the use of excess space. Therefore, it is suggested that the use of school facilities should be to facilitate, through a wise allocation of resources, the highest quality of education across the province, consistent with realistic economic and social objectives. This, then, implies that the prime function of educational facilities is the delivery of quality educational programs. This excess space should be used to enhance a district's ability to deliver educational programs, with users of excess space becoming supplementary to the educational programs and users.

This final report, a consolidation of the three stage study process, provides an overview of the experience of other jurisdictions, reviews the problems and possibilities for the Edmonton Separate School District with regard to excess space, provides a strategy for the management of excess space, and finally, provides a review of the action necessary by Alberta Education, school districts and municipalities, to facilitate the use of excess school space.

CHAPTER ONE

: EXCESS SCHOOL SPACE
- Burden or Blessing ?

CHAPTER ONE
: EXCESS SCHOOL SPACE - BURDEN OR BLESSING ?

I. EXPERIENCE OF OTHER JURISDICTIONS

The dilemma of excess space is a recent and somewhat surprising problem for most school districts in North America. In 1974, the Educational Facilities Laboratories found, through a survey of 100 school jurisdictions in 40 states, that a common first response to the excess space problem was simply not to notice.

> *As with population, so with enrollments; the momentum of past growth tended to obscure the effect of current change. (Fewer Pupils/Surplus Space, EFL: 1974, p.8)*

Those who had become aware of the new situation welcomed it:

> *When shrinkage first occurs, the survey shows that superintendents tend to follow the same priorities in allocating freed-up classroom space. Primary consideration goes to "curriculum enrichment"; in the case of older schools that usually means recapturing space for art and music rooms, or expanding math and science labs.... Over and above such catching up, enrichment means the development or expansion of the newer techniques...(EFL: 1974, p. 29)*

But even as administrators were using the space to broaden the range of their educational services, the problem itself was escalating. Too many classrooms became available and whole schools were operating well below capacity.

II. THE ROOT OF THE PROBLEM

The excess school space problem is not simply a matter of educational over-building to meet the demands of the baby boom, and consequent empty classrooms now that the birth rates are declining. Without doubt, the general decline in birth rates across North America is contributing to the decline in school enrollments. For example, the Alberta birthrate has declined from 30.6/1000 in 1960 to 20.0/1000 in 1970 resulting in a major shift in the Alberta population distribution by age group, and consequently, in a substantial general decline in enrollment.

Shrinking of the population, particularly the school age population, is not, however, the only factor in declining enrollments. The shifting of population settlement patterns has

a major effect on enrollments, especially on a neighbourhood-by-neighbourhood, school-by-school basis. As neighbourhoods mature, their population profiles mature also; areas where schools were bulging at the seams in the early sixties are now closing schools. As economic conditions change, young families (the ones with children) move to different parts of the country, open new areas of the province, settle in different neighbourhoods in the towns and cities. The relationship of shrinkage and shift might well be compared to the relationship of ocean waves and tides; the waves of population decline affect the whole school population. But these waves can be completely obscured by high tides of local movement either into a community due to economic boom or desirability of a newly developed area, or out of a community for reasons such as change of predominant housing type, closing of industry, or changes in zoning policies.

> *The causes of decline due to changing demographics are more complex. Among the possible reasons for a drop in the number of families with school-age children in districts may be:*
>
> *- loss of jobs in the area, due to major businesses or industries moving out;*
> *- a slow down in previous industrial or business growth;*
> *- zoning policies that inhibit new housing young families can afford;*
> *- lending or tax policies that encourage housing development further out in the suburbs;*
> *- highway construction that makes non-city living more attractive;*
> *- an increase in the numbers of senior citizens who, for economic reasons, choose to remain in housing that might otherwise be occupied by young people with children;*
> *- deterioration of neighbourhoods to the point that they are seen as less desirable places to bring up children - crime, pollution, traffic, lack of recreation facilities;*
> *- renovation or restoration movements in inner city areas that replace large, low-income families with children with childless, more affluent residents; (NSBA: 1978, p.5, 6)*

III. TYPICAL RESPONSES TO EXCESS SPACE

The initial response to excess school space has been to upgrade and expand educational opportunities. For many districts, however, this response does not fill the space available. From the educational literature, and surveys conducted during Stage I

of the Edmonton Separate School District case study, we have identified three general dispositions of excess space: mothballing, rental/lease (which can further be divided into short, medium and long term) and sale of property.

A. MOTHBALLING:

Given the possibilities for vandalism, general building deterioration, and community pressure, mothballing is generally seen as the least desirable alternative for schools.

B. SHORT AND MEDIUM TERM LEASE:

Perhaps the most common immediate response to surplus school space is the offer of space to other education, community or government uses. School space usually becomes vacant, at least at first, on a classroom by classroom basis. Many community organizations only require reasonably small spaces, and it is consequently appropriate for them to take up space classroom by classroom. Second, by allowing community uses in portions of schools, a school board may keep many schools open even with declining enrollments, yet utilizing the facilities fully. In addition, since short or medium term users are almost always community, government, or other non-profit organizations, the administration does not have to deal with the somewhat thorny problem of renting publicly supported facilities to private profit making organizations. Finally, short term or medium term leases allow an administration to return schools to school uses should enrollments require.

In summary, short and medium term leasing has the advantage of allowing space sharing, and reasonably easy re-conversion of space to educational uses. It has the disadvantage of limiting potential uses, and, perhaps, of limiting any economic return on the space.

C. LONG TERM LEASE/SALE OR OTHER DISPOSITION OF PROPERTY:

The education literature and our initial inventory indicate that a substantial number of school jurisdictions sell facilities, or return them to another level of government where the school property is owned by the municipality, province or state.

Long term lease or sale of property generally allows for a broader range of supplementary uses, and perhaps, provides an economic return on property for a school district. On the other hand, it usually requires the closing of whole schools, considerable modification of buildings, and makes re-conversion of space to educational uses difficult or impossible.

IV. POTENTIAL SUPPLEMENTARY USERS OF EXCESS SPACE

Our examination of the educational literature and our inventory of supplementary uses indicates a broad range of supplementary uses. Table I.I consolidates the range of uses identified into 12 categories whose requirements were investigated through a more detailed questionnaire sent to selected school districts which had reported uses in those categories. This second survey confirmed that while the range of potential users is broad, the range of current users of excess space still owned by a school district is rather narrower. For example, users such as restaurants, small stores, and housing projects (with the exception of one group home) were all developed in schools that had been sold by the school boards to private or public corporations. Of the 21 questionnaires returned by school boards, all of which had retained ownership of their excess space, private education uses were reported in 11, public education uses reported in 7, private or public service in 5, private or public recreation in 3, and private spiritual in 3. This represents a considerable narrowing of the field of potential uses.

Table I.I SUPPLEMENTARY USE CATEGORIES

	School Retained		School Sold	
	Abs. Freq.	% Rel. Freq.	Abs. Freq.	% Rel.Freq.
Type of Use		%		%
Public education	27	32.0	4	16.0
Private education	23	27.4	3	12.0
Public recreation	6	7.1	1	4.0
Private recreation	4	4.8	1	4.0
Public service	8	9.5	3	12.0
Private service	5	6.0	2	8.0
Private social	3	3.6	0	0.0
Public housing	0	0.0	1	4.0
Private housing	1	1.2	4	16.0
Private commercial	1	1.2	3	12.0
Private community centre	3	3.6	1	4.0
Private spiritual	3	3.6	2	8.0
	84	100.0	25	100.00

This narrowing in the range of potential supplementary uses arises from several factors:

First, the pattern of shrinking and shifting enrollments will affect the nature of the space. It is clear from all the literature, as well as from our surveys of users and area superintendents in Edmonton, that the range of acceptable uses in a school which continues to be partially used as a school will be much narrower than the range of potential uses in a school which

no longer functions as a school. Thus, if the shrinking and shifting of populations renders some schools virtually empty, or if there were to be a policy of school closure and consolidation, there would be a substantial increase in the number of entire school buildings declared excess, and a consequent increase in the range of potential uses.

Second, the projected future of school buildings is a key limitation on the space available. If a particular school building is expected to be needed for school purposes within a 3 year period, a school district may not wish to allow uses which will make reconversion to school usage difficult or expensive. If there is no expectation that the school enrollments will increase in the future, the range of potential uses will broaden.

Third, the physical structure and condition of any particular school will place a limitation on the space available. Certain types of school construction are more adaptable for cost-efficient alteration, thus allowing a broader range of potential uses in such structures. In addition, some styles of building design and form are more flexible, for example, those which allow access to self-contained sections of the school, or which might allow easy temporary alteration of room sizes.

Fourth, the prevailing market for land and buildings within the general context of the particular city and neighbourhood will affect the marketability of the space. If land, particularly inner city and inner suburban land, remains in short supply and expensive, the attractiveness of school lands and buildings for other uses may increase. If this economic attractiveness were enhanced by a defined school board policy of promoting a variety of uses through appropriate long-term tenure arrangements, the range of potential users might increase appreciably.

Fifth, and possibly the key limiting factor is the collective expectation or vision of the community - and in particular, of the school district supporters, teachers, administrators, and board members - of the appropriate functions to be fulfilled or the activities to be carried out in a 'School.' While the physical plant may need to be renovated, and board policies amended, the modification of community expectations may in the long run be the most serious limitation on the range of feasible potential users.

Different groups of supplementary users may have specific locational, legal, physical, economic, timing, tenure and term requirements which may not be compatible with any one or more of these limitations. As illustrated in Tables 1.2 to 1.4, summarizing the results of the questionnaries sent to the other jurisdictions, even users in the same general category may have different requirements.

TABLE I.2: USER REQUIREMENTS

USES \ REQUIREMENTS	SPATIAL												SUPPORT SYSTEMS UTILIZED						FORM OF TENURE			LOCATION						
	TOTAL SCHOOL EXCESS		PERCENTAGE DESIGNATED AS EXCESS								CLIENT USE ALL SPACE											SERVICE TO AREA		REASONS FOR SELECTING SCHOOL				
	YES	NO	CLASSROOM	LABS	LIBRARY/AVC	GYM/REC	ADMIN	STORAGE	GROUNDS	YES	NO	WASHROOM	KITCHEN	STORAGE	PARKING	JANITORIAL	OTHER	LEASE	MONTHLY	OTHER	YES	NO	AREA SERV'D	PUBLIC TRANS.	NEIGHBOURHOOD	OTHER.		
PUBLIC/PRIVATE/EDUCATION/REC																											
PRIVATE SPIRITUAL/EDUCATION																		●									
PUB. ED/SERVICE/PRIV. ED																		●									
PUB. REC./SERVICE/PRIV REC/SPIRITL		●																		●							
PRIVATE SERVICE	●										●	●			●			●				●	●				
PUBLIC SERVICE		●	37	50		25			50	●		●			●	●		●			●		●		●		
PRIVATE SERVICE		●	20				30	30			●	●		●	●	●		●				●				●	
PRIVATE SPIRITUAL		●	27				100	20			●	●		●	●			●				●	●			●	
PRIVATE EDUCATION	●									●		●	●	●	●	●		●			●		●	●	●	●	
PUBLIC EDUCATION		●										●	●	●	●	●			●		●		●				
PUBLIC EDUCATION	●									●		●		●	●	●	●					●				●	
PRIVATE RECREATION		●		5						●		●						●				●				●	
PRIVATE EDUCATION		●	<12								●	●				●		●			●		●			●	
PRIVATE EDUCATION		●	10								●	●			●			●			●		●			●	
PUBLIC EDUCATION		●	12							●		●		●	●	●						●		●		●	
PRIVATE SOCIAL		●	11							●		●				●			●			●		●		●	
PRIVATE EDUCATION		●	10							●		●		●	●	●		●				●	●			●	
PUBLIC EDUCATION	●									●		●		●	●			●				●				●	
PUBLIC EDUCATION		●	10								●	●							●		●				●		
PRIVATE EDUCATION		●	6·7								●	●				●		●			●		●	●			
PRIVATE EDUCATION	●									●		●			●	●		●				●				●	

TABLE 1.3: PREREQUISITE ACTIVITIES

USES \ PREREQUISITE ACTIVITIES	PHYSICAL MODIFICATIONS						MODIF'NS TO SECURITY/ CIRC'N				LAND USE CONTROLS				NEIGHBOURHOOD INVOLVEMENT		LEGISLATIVE, POLICY MODIFICATIONS									
	REQ'D TO SPACE		REQ'D TO SUPPORT SYSTEMS		BOARD APPROVAL REQ'D		REQ'D TO CIRC'N/ SECURITY		LIMITING FACTOR		REQ'D CHANGE		LIMITING FACTOR				INTENTION TO RE-USE SPACE		REQ'D BOARD POLICY CHANGE		REQ'D BOARD POLICY CHANGE FOR OTHER GROUPS		REQ'D LEG. CHANGE		
	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO					
PUBLIC/PRIVATE/EDUCATION/REC		●							●			●		●	●										
PRIVATE SPIRITUAL/EDUCATION					●					●		●	●		●										
PUB. ED/SERVICE/PRIV. ED					●					●		●		●		●									
PUB. REC./SERVICE/PRIV. REC./SPIRIT'L		●			●				●			●		●	●										
PRIVATE SERVICE		●		●	●			●		●		●		●		●		●		●	●			●	
PUBLIC SERVICE		●		●	●			●		●		●		●		●	●			●	●			●	
PRIVATE SERVICE	●			●	●			●		●		●		●	●			●		●		●		●	
PRIVATE SPIRITUAL		●		●	●			●		●	●		●			●		●		●		●		●	
PRIVATE EDUCATION	●					●	●			●		●	●		●			●		●		●	●		
PUBLIC EDUCATION	●*		●		PRINCIPAL			●		●		●	●		●			●	●			●		●	
PUBLIC EDUCATION	●*							●		●		●		●		●		●		●		●		●	
PRIVATE RECREATION	●*			●	●		●		●			●		●		●		●		●					
PRIVATE EDUCATION		●		●				●	●			●		●		●	●			●		●		●	
PRIVATE EDUCATION		●			●			●		●		●		●		●	●			●		●		●	
PUBLIC EDUCATION	●			●				●		●		●	●			●				●	?	●?		●	
PRIVATE SOCIAL		●		●	●			●	●			●		●		●		●		●		●		●	
PRIVATE EDUCATION		●		●	●			●	●			●	●			●	●			●		●		●	
PUBLIC EDUCATION		●		●	●			●		●		●		●		●	●			●		●		●	
PUBLIC EDUCATION		●		●				●		●		●		●		●	●			●	●			●	
PRIVATE EDUCATION		●		●	●		●		●			●		●		●	●		●		●			●	
PRIVATE EDUCATION	●			●	●			●	●			●	●			●		●		●		●		●	

*= MINOR CHANGES E.G., PAINTING

TABLE 1.4: ECONOMIC IMPLICATIONS

USES / ECONOMIC IMPLICATIONS	RESPONSIBILITY FOR COSTS OF MODIFICATIONS				RESPONSIBILITY FOR SERVICES										RENT			PROPERTY TAX STATUS CHANGE ?		INSURANCE RATES CHANGE ?		ABILITY TO PAY A LIMITING FACTOR ?		DEPENDS UPON USER			
	CLIENT	BOARD	OTHER		JANITORIAL			BUILDING MAINT			GROUNDS MAINT.			MAJOR REPAIRS			WILL BE REGULAR COSTS		USER PAY EC. RENT		YES	NO	YES	NO	YES	NO	①	*
PUBLIC/PRIVATE/EDUCATION/REC					CLIENT	BOARD	OTHER	CLIENT	BOARD	OTHER	CLIENT	BOARD	OTHER	CLIENT	BOARD	OTHER	YES	NO	YES	NO	?		?			●		
PRIVATE SPIRITUAL/EDUCATION																						●					
PUB. ED/SERVICE/PRIV. ED																								●			
PUB. REC./SERVICE/PRIV. REC./SPIRIT'L																					?		?			●	
PRIVATE SERVICE					●			●			●			●			●		●		●		●		●		
PUBLIC SERVICE						●			●			●			●		●		●		●		●		●		
PRIVATE SERVICE						●			●			●						●		●		●		●		●	
PRIVATE SPIRITUAL					●				●			●			●		●		●		?		●		●		
PRIVATE EDUCATION①			●		●			●						●			●		●			●		●			
PUBLIC EDUCATION	●					●			●			●			●		●		●			●		●			
PUBLIC EDUCATION		●				●			●			●			●			●		●		●		●			
PUBLIC RECREATION					●				●						●						●		●		●		
PRIVATE EDUCATION						●			●			●			●					●		●		●			
PRIVATE EDUCATION						●		●				●			●					●		●		●			
PUBLIC EDUCATION						●			●			●			●						●		●		●		
PRIVATE SOCIAL						●			●			●			●					●		●		●			
PRIVATE EDUCATION①						●			●			●			●						●		●		●		
PUBLIC EDUCATION					●				●					●			●		●			●		●			
PUBLIC EDUCATION①						●			●			●			●						●		●		●		
PRIVATE EDUCATION①						●			●			●			●					●			●		●		
PRIVATE EDUCATION	●				●			●			●			●			●		●			●		●		①	

V. CONSTRAINTS TO SUPPLEMENTARY USES

Our questionnaires, and the education literature indicate that there are several constraints to innovative uses of school space. In part, it seems fair to assume that the preponderance of education uses, and short-term recreation or government office uses reflect the fact that many school jurisdictions have chosen to accept only those uses which fit easily within the already existing physical, legal, economic, and neighbourhood structure. The exploration of more innovative uses would require serious attempts to eliminate at least some of the constraints.

There is a variety of major constraints to extensive changes in the use of school space. J. Ringers (1976) identifies the following constraints, particularly for joint use facilities.

> *Site Selection - Non-school programs depend heavily upon access by public transportation, private cars (and parking accommodations), and sidewalk networks.*
>
> *Zoning Problems - In those communities where zoning ordinances are in effect, further complications beset the planners for joint-use facilities.*
>
> *Building Codes - When building or modifying for multiple-use occupancy, planners should recognize that building codes may impose different requirements on the builders.*
>
> *Design Considerations - Planners and architects should be well aware of design adaptations which must be considered in providing for private areas, character and flexibility of space, and provisions for handicaps.*
>
> *Private Areas - A commonly overlooked necessity in plans for multiple-use is the need for privacy of the several occupants. There must be space allocated for private work space and for private storage for the principal users.*
>
> *Character of Space - Since multiple-occupancy programs depend upon clients who are not required to participate, the space in which the program is to take place should be inviting as well as appropriate to the function.*
>
> *Flexibility of Space - Community/Schools should not only be large enough to accommodate community programs, but should also be able to*

change with ease to permit a well-resolved solution to a problem. (Ringers, Community /Schools and Interagency Programs, 1976. Excerpts from Chapter 12)

Our questionnaires requested information on the following constraints: insurance requirements for user, physical modifications required to space for user, physical modifications to support systems, modifications to security and circulation, land use policy modifications, school board policy changes, legislation changes, and the client's ability to pay as a constraint. The responses to these questions are indicated in Table 1.5.

TABLE 1.5 : CONSTRAINTS TO SUPPLEMENTARY USES

USES \ CONSTRAINTS	INSURANCE REQ'TS OF CLIENT	MODIFICATIONS OF SPACE	MODIFICATIONS OF SUPPORT SYSTEMS	MODIFICATION OF SECURITY	BOARD APPROVAL FOR MODIFICATIONS	LAND USE CHANGE REQ'D	LAND USE LIMITING	BOARD POLICY CHANGE	LEGISLATION CHANGE	CLIENTS ABILITY TO CHANGE
PUBLIC/PRIVATE/EDUCATION/REC										
PRIVATE SPIRITUAL/EDUCATION	●				●		●			●
PUB. ED/SERVICE/PRIV. ED	●				●					
PUB. REC/SERVICE/PRIV. REC./SPIRIT'L					●					●
PRIVATE SERVICE	●				●					
PUBLIC SERVICE					●					
PRIVATE SERVICE	●	●			●					
PRIVATE SPIRITUAL	●				●	●	●			
PRIVATE EDUCATION	●	●		●			●		●	
PUBLIC EDUCATION		●	●				●	●		●
PUBLIC EDUCATION		●								
PRIVATE RECREATION	●	●		●	●					
PRIVATE EDUCATION	●									
PRIVATE EDUCATION					●					●
PUBLIC EDUCATION		●					●			
PRIVATE SOCIAL	●				●					
PRIVATE EDUCATION					●		●			●
PUBLIC EDUCATION					●					●
PUBLIC EDUCATION										
PRIVATE EDUCATION	●			●	●			●		●
PRIVATE EDUCATION	●	●			●		●			

CHAPTER TWO

: CASE STUDY - THE PROBLEM

CHAPTER TWO

: CASE STUDY - THE PROBLEM

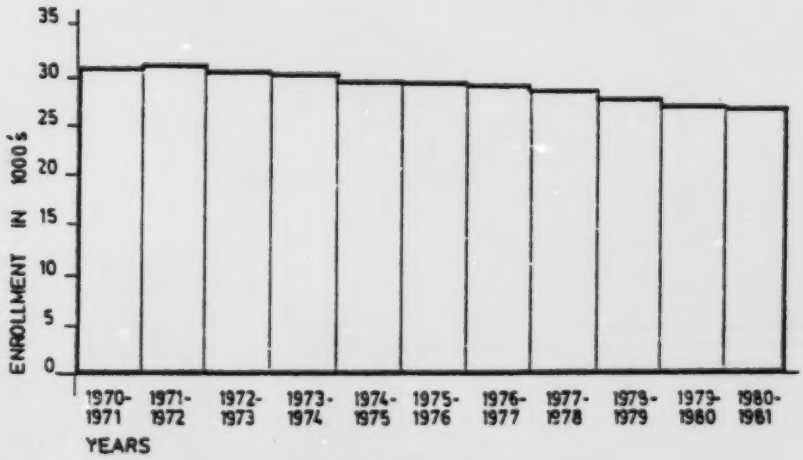
1. CHANGING PATTERNS OF ENROLLMENTS

At first glance, the Edmonton (R.C.) School District #7 may not appear to have a problem with declining enrollments and excess space. As illustrated in Graph 1, in a ten year period between 1970/71 and 1980/81, enrollments only decreased approximately 16%.

Prior to this period, during the period 1960/61 to 1970/71, E.S.S.B. administrators were faced with the problem of rapidly increasing enrollments, as enrollments doubled. Thus, when viewed in the context of the last two decades, a decline of 16% does not seem particularly alarming. Certainly enrollments have shrunk, but the numbers are still quite high and if projections of a mini-boom are accurate, (see Appendix 1, Chapter II), it might seem that overall enrollments could stablize, or indeed, increase. However, as observed from the experience of other jurisdictions, excess space is affected by shifting enrollments as well as by shrinking enrollments.

In order to analyze the impact of shifting enrollments on the Edmonton Separate School District, the City of Edmonton was divided, as illustrated on Map 1, into the following three areas: inner core, inner suburbs and outer suburbs. These boundaries were derived from the Edmonton General Municipal Plan.

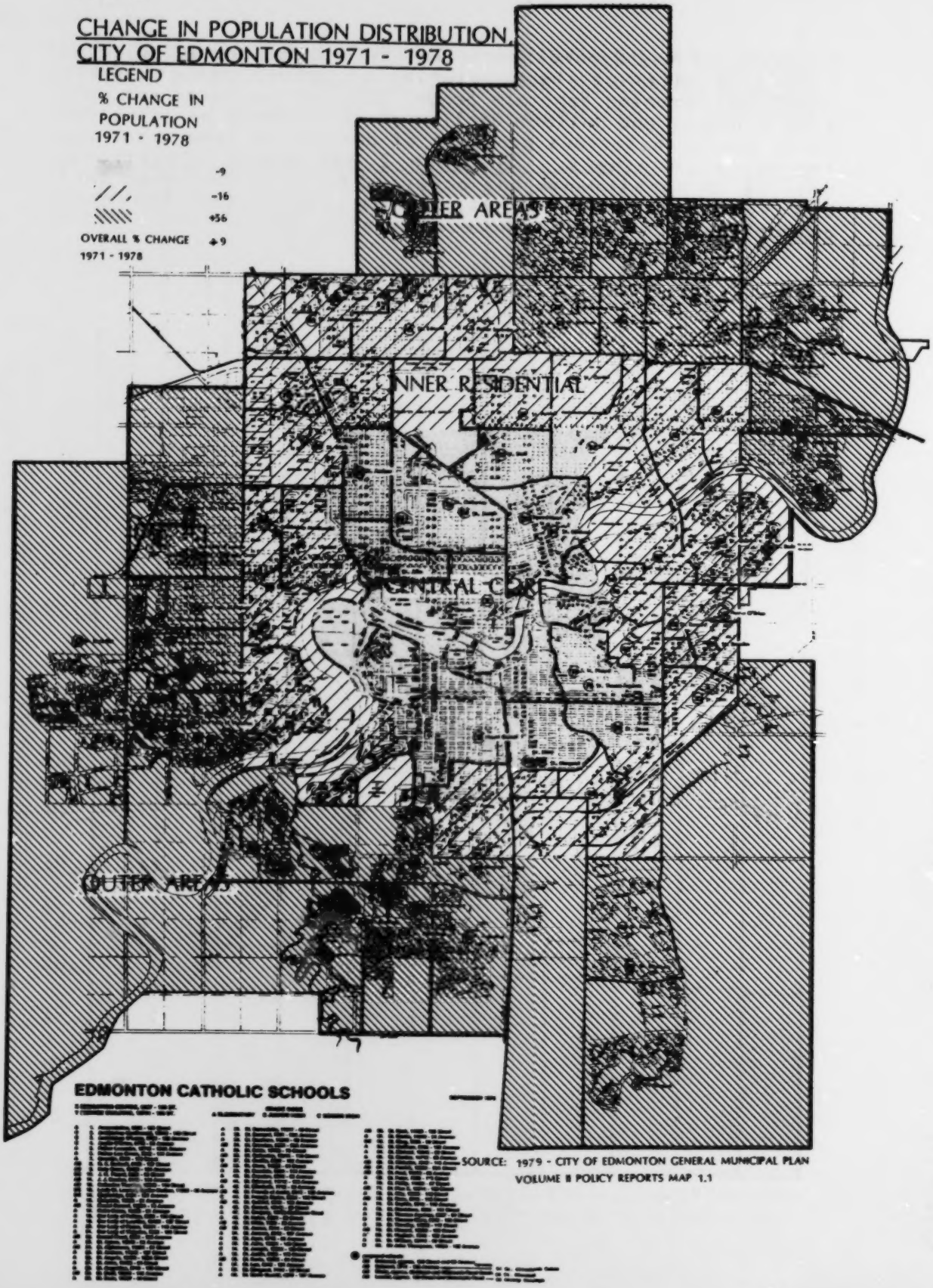
GRAPH 1 - GRADES 1-12 ENROLLMENTS, EDMONTON (R.C.) SEPARATE SCHOOL DISTRICT #7, 1970 - 71 SCHOOL TERM TO 1980 - 81 SCHOOL TERM



SOURCE: EDMONTON SEPARATE SCHOOL BOARD

MAP 1

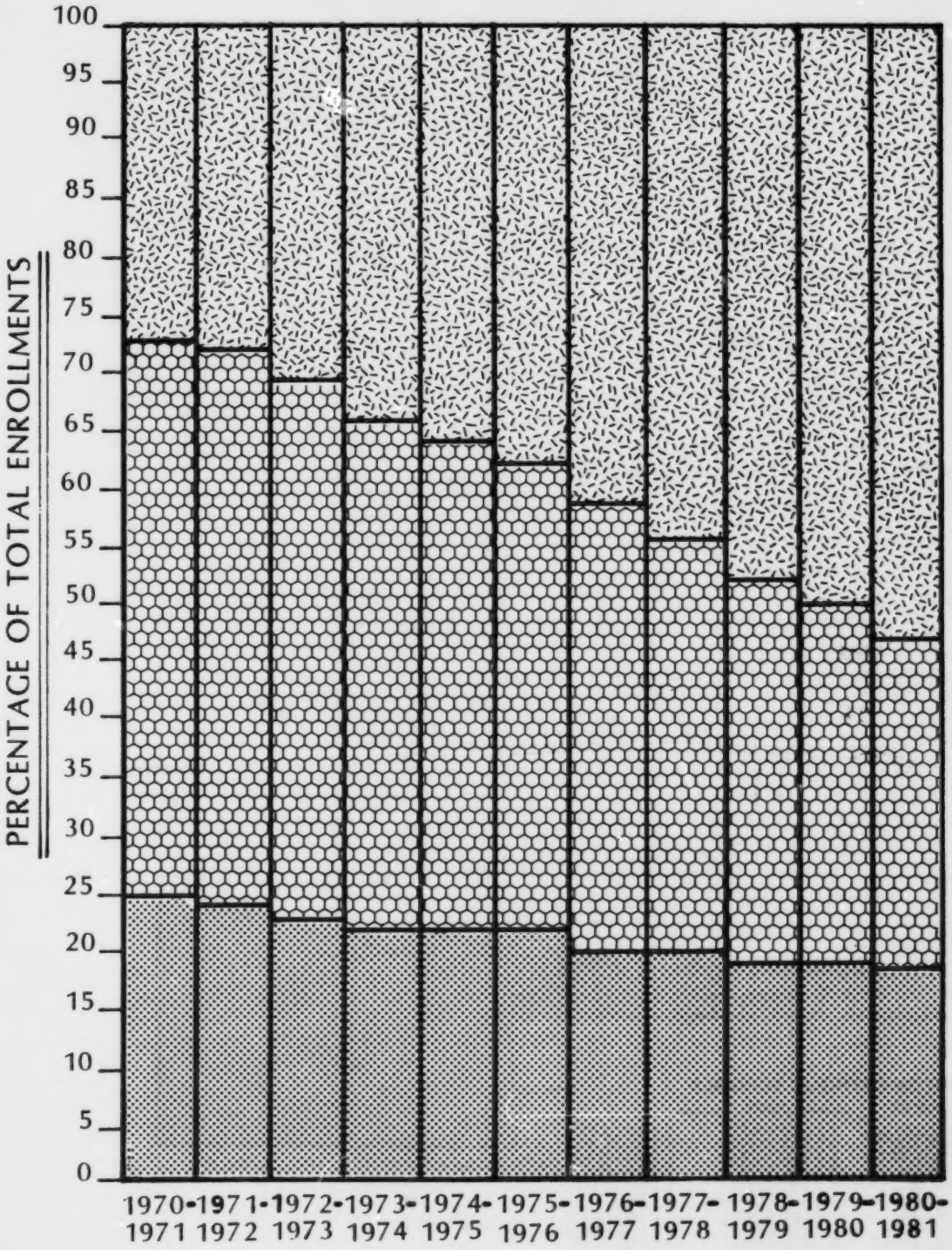
CHANGE IN POPULATION DISTRIBUTION, CITY OF EDMONTON 1971 - 1978



SOURCE: 1979 - CITY OF EDMONTON GENERAL MUNICIPAL PLAN VOLUME II POLICY REPORTS MAP 1.1

A review of K - 9 enrollments in these three areas indicated a massive shift of the population of school age children. Thus, the Edmonton Separate School District is faced not only with a modest and uniform decline of enrollments of 16% since 1970, but with serious problems of decline in some areas and increases in others. As Graph 2 and Map 2 illustrate, decline in enrollments has occurred both in the inner core and suburban communities, while the outer suburban communities had a major increase in enrollments.

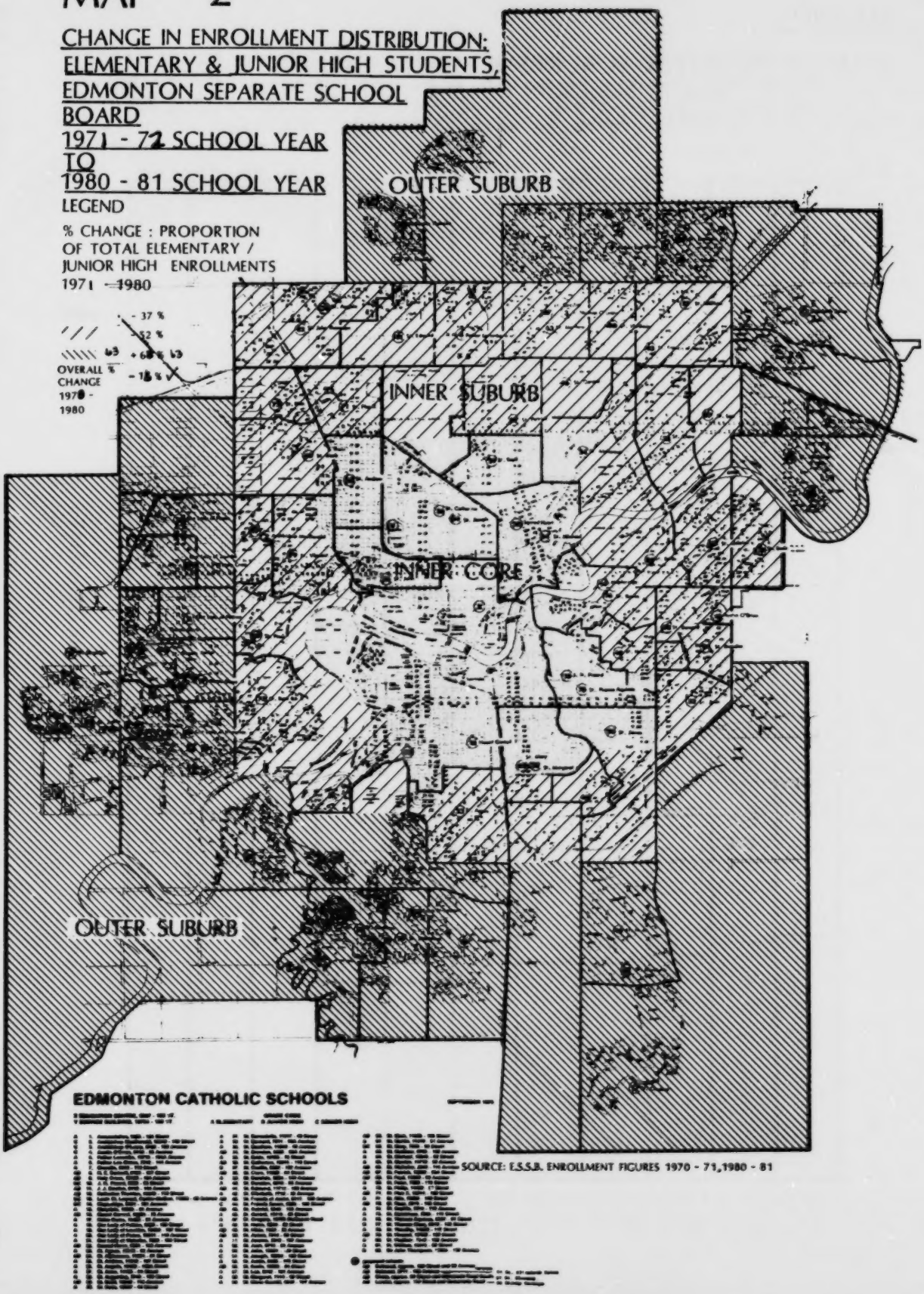
GRAPH 2 - ENROLLMENT DISTRIBUTION 1970/71 - 1980/81



SOURCE ESSB ENROLLMENTS

MAP 2

CHANGE IN ENROLLMENT DISTRIBUTION: ELEMENTARY & JUNIOR HIGH STUDENTS, EDMONTON SEPARATE SCHOOL BOARD 1971 - 72 SCHOOL YEAR TO 1980 - 81 SCHOOL YEAR



The magnitude of this shift in enrollment distribution is illustrated more dramatically when the absolute number of enrollments, exclusive of senior high and special school (Marydale, Terra, Mapleridge) students is reviewed. Of the 24,858 students enrolled in the district in 1970/71 - 18,190 were served by the inner core and inner suburban schools. However, by the 1980/81 school year, of the 20,698 students enrolled, only 9,660 students were served by the inner core and inner suburban schools. If the inner core and inner suburban schools were to service the same number of students in 1980/81 as they did in 1970/71, they could serve 88% of the 1980/81 enrollments. This shift of school age population is not unique to the Edmonton Separate School District, rather it is reflective of the shift in total population of the City of Edmonton. As Map I illustrated, between 1971-78, there was a shift in the population from the inner core and inner suburban areas to the outer suburban areas. During this period, the population of the city as a whole increased 9%; the inner core decreased by 9%; the inner suburbs decreased by 16%, and the outer suburbs increased by 56%. The increase in the outer suburbs was a result of immigration, migration, and shifting of population from other parts of the city. It should be remembered that the movement of population (whether within a city or between cities) does not necessarily result in the movement of a representative sample of the population. Young newly formed families and couples about to form families are more likely to be moving, both across the country and within cities, than are older couples whose familiy sizes have stabilized, and whose homes represent a considerable accumulation of equity. Thus, it is likely that exactly those people who are having children and impacting on school enrollments are the people who are shifting their residence.

An analysis of potential enrollments indicated that the patterns of enrollment of the last decade may continue for the next five years,(1985/86). On an overall system basis, it is estimated that enrollments (K - 9) will stabilize or even increase slightly. Inner core and inner suburban enrollments, however, will continue to decline, as will the aging outer suburban communities, while in the newly developing outer suburban area, enrollments will continue to increase. (A detailed analysis of enrollments and enrollment projections is contained in Appendix II, Chapter 2.)

II. ENROLLMENTS AND EXCESS SPACE

A. POTENTIAL FOR EXCESS SPACE

To get a preliminary sense of the amount of potential excess space these shrinking and shifting enrollments have caused within the Edmonton R.C. Separate School District, a comparison was made of the relationship between the potential available school space and the 1980/81 K - 9 enrollments. This comparison was done on a school by school basis for the inner core schools, the inner suburban schools, and for those schools in the outer suburbs whose enrollment decreased 20% or more between 1970/71 and 1980/81. For the purposes of this comparison, available space included all classrooms, ancillary rooms, and home economics or industrial arts rooms whether currently used for student education or not, and enrollments included the total number of enrollments in the particular school not converted into full time equivalents. In order to establish a relationship between the number of enrollments and the space available within the schools, the total number of student spaces was established by allowing a capacity of 25 student spaces for each classroom or ancillary room, and 20 student spaces for each home economics or industrial arts room. A student/space ratio for each school was then calculated by dividing the total enrollments by total available student space per school. Hence the comparison does not provide an actual indication of school utilization, but merely provides an overview of potential excess school space.

Schools with a student/space ratio of .6 or less were considered to have poential excess space. A ratio of .6 or less as an indication of potential excess space was selected rather than a higher ratio as this preliminary analysis does not take into account any deductions of ancillary space or special facilities. It is estimated that these deductions would increase the actual student/space ratio by .15 to .20. Therefore, a student/space ratio of .6 was interpreted to indicate that 20 - 25% of the existing school facility might be considered potential excess space.

As illustrated in Tables 2.1, 2.2, and 2.3, nearly three-quarters of the schools reviewed had a student/space ratio of .6 or less. Although a higher percentage of inner core schools than inner suburban schools showed student/space ratios of .6 or less, a higher proportion of inner suburban schools showed ratios of .5 or less, indicating that these inner suburban schools have the greatest potential for excess space.

TABLE 2.1: COMPARISON OF NUMBER OF STUDENTS PER AVAILABLE STUDENT SPACES 1980 - 81 SCHOOL TERM FOR THE FOLLOWING INNER CORE SCHOOLS

SCHOOL	RATIO OF STUDENTS PER STUDENT SPACE
St. Andrew	.378 students per 1 space
St. Catherine	.586 students per 1 space
St. John	.180 students per 1 space
St. Alphonsus	.486 students per 1 space
Sacred Heart	.476 students per 1 space
St. Michael	.515 students per 1 space
Grandin	.532 students per 1 space
St. Thomas Aquinas	1.072 students per 1 space
St. James	.551 students per 1 space
St. Margaret	.616 students per 1 space
Mount Carmel	.461 students per 1 space
St. Peter	.000 students per 1 space
St. Basil	.588 students per 1 space
Old St. Anne	.000 students per 1 space
St. Anthony	.000 students per 1 space

*Note: available space data not available for St. Mary's Sr. High and J. H. Picard Jr. High

TABLE 2.2: COMPARISON OF NUMBER OF STUDENTS PER AVAILABLE STUDENT SPACES 1980 - 81 SCHOOL TERM FOR THE FOLLOWING OUTER SUBURBAN SCHOOLS.

SCHOOL	RATIO OF STUDENTS PER STUDENT SPACE
St. Martin	.785 students per 1 space
St. Boniface	.738 students per 1 space
Our Lady of Victories	.591 students per 1 space
Notre Dame	.337 students per 1 space
Annunciation	.497 students per 1 space
Our Lady of Fatima	.312 students per 1 space
Holy Cross	.406 students per 1 space
Our Lady of Lourdes	.597 students per 1 space
Our Lady of Peace	.526 students per 1 space
St. Bernadette	.720 students per 1 space
St. Nicholas	.950 students per 1 space
St. Luke	.000 students per 1 space
St. Thomas More	.538 students per 1 space
H.E. Beriault	.683 students per 1 space

TABLE 2.3: COMPARISON OF NUMBER OF STUDENTS PER AVAILABLE STUDENT SPACES
1980 - 81 SCHOOL TERM FOR THE FOLLOWING INNER SUBURBAN SCHOOLS

SCHOOL	RATIO OF STUDENTS PER STUDENT SPACE
St. Agnes	.156 students per 1 space
St. Dunstan	.000 students per 1 space
St. Joan	.000 students per 1 space
St. Brendan	.679 students per 1 space
St. Helen	.000 students per 1 space
St. Kevin	.319 students per 1 space
St. Bride	.000 students per 1 space
St. Gabriel	.378 students per 1 space
St. Bede	.411 students per 1 space
St. Clare	.410 students per 1 space
St. Leo	.588 students per 1 space
St. Francis of Assisi	.829 students per 1 space
St. William	.340 students per 1 space
St. Gerard	.632 students per 1 space
St. Matthew	.645 students per 1 space
St. Cecilia	.611 students per 1 space
St. Edmund	.612 students per 1 space
Fr. Lacombe	.356 students per 1 space
St. Patrick	.507 students per 1 space
St. Pius X	.356 students per 1 space
St. Angela	.315 students per 1 space
Sir John Thompson	.405 students per 1 space
St. Rita	.360 students per 1 space
St. Mark	.497 students per 1 space
St. Vincent	.296 students per 1 space
St. Paul	.935 students per 1 space
St. Rose	.189 students per 1 space
St. Vladimir	.552 students per 1 space
St. Gregory	.000 students per 1 space
St. Bernard	.000 students per 1 space

To summarize then, the overall shrinking of enrollment, and the shift in the distribution of that enrollment has put the Edmonton Separate School District in a difficult situation. In some areas of its jurisdiction, it has to deal with issues such as increasing enrollment, lack of space, over-crowding and the development of new school facilities, while at the same time in other areas, it must deal with declining enrollments, an abundance of school space, underutilized classrooms, and the question of what is to be done with the excess space. The preliminary review of current utilization of existing school facilities indicates that there is indeed considerable existing and potential excess space.

B. POTENTIAL EXCESS AND EFFECTIVE EXCESS

Although the student/space ratio certainly indicates that there is potential excess space within the Edmonton Separate School District it does not indicate whether any of this potential excess can in fact be used by supplementary users. In order for potential excess space to be effectively used by a supplementary user, it must be both definable and separable; i.e. the Community Whist Tournament can't be held in the back of a half-filled classroom: A school with a student/space ratio of .5 may not have 50% of its space available for supplementary users.

Arriving at a suitable method of identifying both potential and what we will call 'effective potential' excess space is, however, a rather complex problem. The first method reviewed was the Provincial Government Utilization Formula.*

Two factors are compared in order to obtain the utilization ratio under this formula. The first factor is what is termed the operational capacity of the school. The second is the full-time equivalent total enrollment for the school as of September 30th each year. The actual total available space within a school may not, however, be included in the determination of the operating capacity of a school. Since this formula was originally developed to determine funding for replacement, renovation, and new buildings, the following fixed deductions were established to allow for the age of a facility, ancillary space requirements, and space that has been rented out.

a) a school or portion of a school that is

(i) a portable classroom under a school building project for which the tender or scheme of construction was approved by the Minister prior to December 31, 1974, and 15 years old or more.
(ii) a portable classroom other than a portable classroom described by subclause

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*This formula was developed as part of the School Buildings Regulation. (Alberta Regulation 180/79, amended by the Alberta Regulation 233/79 and Alberta Regulation 198/80) to determine how much provincial support would be available to a particular school board for the construction of any new school buildings, the replacement of existing school buildings, or the addition to existing facilities. With the exception of the first elementary school constructed in a new subdivision of 2.6 square kilometers or larger within the cities of Edmonton and Calgary, the amount of financial support that a school board will be able to obtain from the Province is directly related to its utilization of its

(l), and 20 years old or more,
(iii) of wood frame construction and 35 years old or more, or
(iv) constructed of reinforced concrete, steel laminated wood beams or masonry and 50 years old or more;

(b) one classroom in each school building with a fixed capacity of 500 or less;

(c) two classrooms in each school building with a fixed capacity over 500;

(d) a portable section utilized temporarily with the approval of the board, in new growth areas while a new school building is being planned or completed;

(e) a school or part of a school that, with the approval of the Minister under The School Act has been

(i) turned over to the Minister of Housing and Public Works,
(ii) converted to another public use by agreement with another public body,
(iii) leased for a specific purpose;

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existing facilities. Under the current formula, the maximum financial support that a board can obtain is 85% of the maximum predetermined support for the type of building in the particular area. This amount can be increased to 85.85% if the school building project provides for the integration of special education satisfactory to the School Buildings Board. In order to obtain this support for the building of a particular school, a school district would have to have an overall utilization rate of 85% or greater within its existing schools, unless the school under construction was the first elementary school in a subdivision.

In the case of the Edmonton R.C. Separate School District, which has an overall utilization ratio of 73.14%, the maximum financial support (other than for a first time elementary school) for which they could be eligible would be 73.14% of the maximum predetermined assistance.

(f) a school or part of a school that has not been disposed of under clause (e) but, with the approval of the board, has been converted to a use other than for the instruction of school pupils;

(g) a school or part of a school with respect to which no appropriation of funds from the Government was used to finance construction.
Source: School Building Regulation, 1979

As well as exempting some types of available space, the Provincial Utilization Formula varies from actual utilization by not counting all enrollments as full-time equivalent enrollments. For example, since Early Childhood Services is a half-time program, it requires two early childhood enrollments to equal one full-time equivalent enrollment.

The provincial formula, thus, provides what can be termed an indication of gross space utilization, and therefore a definition of potential excess space. It establishes a utilization percentage indicating the relationship between the annual full-time equivalent enrollments for the facility and the operational capacity of a school facility. In other words, if a school facility is 50% utilized, it should have 50% excess space.

While the Provincial Utilization Formula is useful in identifying potential excess space, there are three drawbacks to using it to define potential "effective" excess space, that is, space that would be available for use by a supplementary users.

First, the operational capacity is arrived at by deducting age, ancillary facilities, and other deductions such as rentals from the total capacity of the facility. Space deducted from the total capacity may in fact be excess to the needs of a particular school, but would not appear as under-utilized school space. Second, enrollments for programs such as Early Childhood Services, (ECS) which are only half-day programs, are not counted as full enrollments. While it may be accurate from the perspective of establishing full-time equivalent enrollments to count ECS as half-time, in terms of space utilization, programs like ECS, because of their special nature may require classroom space on a full-time basis. This may cause fully-utilized space to appear as under-utilized or excess space. The end result of these two factors is that a school may appear to be either more or less utilized than it actually is. The third drawback to using this formula to establish potential excess space, is that it deals with gross utilization of an entire school based on a fixed operational capacity of 25 students per class space. Thus a school, operating with an average of 20 students per classroom, could appear to have 20% excess space, despite having every classroom used.

To deal with these drawbacks, an alternate formula was developed based upon the nature and configuration of space required for K-12 educational purposes. Termed the School Needs Formula, it identifies the nature and configuration of space required for the delivery of the educational programs:

It should be noted that the School Needs Formula was not developed toreplace the Provincial Utilization Formula with regard to provincial funding, nor is its purpose to resolve the problems of facility underutilization by changing the ground rules for the definition of utilization. Rather, the formula was developed to identify potential "effective" excess space that could be made available to supplementary uses.

As detailed below, the School Needs Formula defines excess space in terms of the nature and configuration of the spaces within a facility, as well as the nature and configuration of space required for the delivery of educational programs.

School Needs Formula

Excess Space Shall Be Defined As

Any space within an existing school building or portion thereof which is not required for the appropriate delivery of K-12 educational programs shall be considered excess school space available for supplementary uses.

For the purposes of this definition, an existing school facility or portion thereof shall include

- all school buildings, including portables that are considered by the school board to be in a condition to be available for educational or other use regardless of age or construction.

- all land upon which a school facility or portion thereof is situated.

For the purposes of this definition, the following formula shall be used for the determination of educational space requirements:

a) Classroom Requirements

. Early Childhood Services: One classroom shall be allocated per every group of students defined as an Early Childhood Services class, regardless of the duration of the Early Childhood Services program. Notwithstanding the foregoing, if a school should have two Early Childhood Services classes, each of which are only a half-day program, a classroom shall be allocated to each class only if such classes are conducted

concurrently. However, if the classes are conducted consecutively, in such a manner that one or more classes could utilize the same classroom space, only one classroom shall be allocated for the program.

. Regular 1-12 Programs: One classroom shall be allocated for

- every classroom teacher;
- every principal who has a homeroom class;
- every vice-principal who has a homeroom class.

b) Special Programs

. In schools that provide special programs, one classroom shall be allocated for each group of pupils defined as a special class for the purposes of the delivery of the special education program. Without limiting the foregoing, special education programs include Adaptation Classes, Educable Mentally Handicapped and Trainable Mentally Handicapped programs.

c) Special Classes

. In schools that have special classes and special class instructors, one classroom appropriate to the needs and requirements of the special class shall be allocated to each special class. Without limiting the foregoing, special classes include resource room programs, learning centre programs, industrial arts programs, and home economics programs.

d) Ancillary Requirements

. One ancillary space shall be required for each 250 students or portion thereof.

e) Support Facilities

. Space within school buildings and land surrounding school buildings shall be allocated in such a manner as to ensure the provision of the necessary support facilities to meet the educational needs of each particular school. Without limiting the generality of the foregoing, support facilities shall include staff and administrative facilities, gymnasium facilities, and outdoor recreational space and facilities.

For the purposes of this formula a classroom shall include

. a physically divided space within an existing

school facility which would be used for the instruction of one group of students considered a class. This shall include ordinary classrooms, home economics rooms, industrial arts rooms, science rooms, business education instruction rooms, art rooms, as well as any other rooms required for any specialized K - 12 educational program.

. physically definable space within an open area or undivided space, excluding a gymnasium or any portion thereof, which is used for the instruction of one group of pupils considered to be a class.

The Provincial Utilization Formula and The School Needs Formula provide different methods of estimating potential excess space, and consequently, provide different end products. The School Needs Formula provides a definition of excess space in terms of rooms available, while the Provincial Utilization Formula provides a definition of excess space in terms of a percentage of gross student space available. Table 2.4 gives a sense of the difference between the utilization calculated by each formula by converting the percentage utilization derived by the Provincial Utilization Formula to classroom equivalents.* The schools analyzed in Table 2.4 had a total classroom capacity of 940 rooms, according to the assumptions of the Provincial Utilization Formula, 606 rooms are required to accommodate the students in these schools, while the School Needs Formula indicates that 697 rooms are required to deliver the type of educational programs offered these students. Approximately 91 additional classrooms are required according to the School Needs Formula. From the perspective of excess space, using the School Needs Formula, there are 243 excess classrooms in these schools, while the assumptions of the Provincial Utilization Formula indicate that there should be approximately 334 excess rooms.*

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*To calculate classroom equivalents for the Provincial Utilization Formula, the full time equivalent enrollments per school were taken, and divided by 25 to establish a base number of classrooms. Since a school need only be 85% utilized to be considered fully utilized, another 15% was added to the base number of classrooms. The appropriate number of ancillary rooms was added to each school based upon its enrollments and the Provincial Utilization Formula.

Table 2.4

UTILIZATION COMPARISON BASED UPON ROOM EQUIVALENTS

A. SCHOOL	B. F.T.E.* SEPT 30/80	C. ROOMS AVAILABLE	D. P.U.F. ROOM** EQUIVALENT	E. EXCESS SPACE P.U.F. (C-D)	F. SCHOOL NEEDS FORMULA ROOMS	G. EXCESS SPACE SCHOOL NEEDS FORMULA (C-F)	H. CLASSROOM DIFFERENTIAL (F-D)
St. Andrew	123	13	6.658	6.342	7	6	+0.342
St. Catherine	284	20	14.064	5.936	16	4	+1.936
St. John	36	8	2.656	5.344	3	5	+0.344
St. Alphonsus	372	32	19.112	12.888	24*	8	+4.888
Sacred Heart	323	28	16.858	11.142	19	9	+2.142
St. Michael	212	18	10.752	7.248	12	6	+1.248
Grandin	292	22	14.432	7.568	16	6	+1.568
St. Thomas Aq.	371	16	18.066	(2.066)	19	(3)	+0.934
St. James	243	18	12.178	5.822	14	4	+1.822
St. Margaret	148	10	7.808	2.192	8	2	+0.192
Mount Carmel	226	20	11.396	8.604	14*	6	+2.604
St. Basil	553	40	27.438	12.562	37*	3	+9.562
St. Agnes	51	13	3.346	9.654	4	9	+0.654
St. Brendan	410	25	20.860	4.140	23*	2	+2.140
St. Kevin	256	33	13.776	19.224	17*	16	+3.224
St. Bede	108	11	5.968	5.032	8	3	+2.032
St. Gabriel	242	28	13.132	14.868	15*	13	+1.868
St. Clare	201	22	10.246	11.754	14*	8	+3.754
St. Leo	183	12	9.418	2.582	12	0	+2.582
St. Francis of Assisi	597	30	29.462	.538	35*	(5)	+5.538
St. William	30	4	2.380	1.620	3	1	+0.620
St. Gerard	148	8	7.808	.192	9	(1)	+1.192
St. Matthew	470	31	23.620	7.380	26	5	+2.380
St. Cecilia	522	35	26.012	8.988	29	6	+2.988
Fr. Lacombe	107	12	5.922	6.078	7	5	+1.078
St. Edmund	578	39	28.588	10.412	30*	9	+1.412
St. Patrick	292	24	15.432	8.568	20*	4	+4.568
St. Pius X	185	22	10.510	11.490	10	12	-0.510
St. Angela	185	25	10.510	14.490	10	15	-0.510
Sir John Thomp.	158	14	8.268	5.732	10	4	+1.732
St. Rita	50	6	3.300	2.700	4	2	+0.700
St. Mark	201	19	10.246	8.754	13*	6	+2.754
St. Vincent	126	17	6.796	10.204	9	8	+2.204
St. Rose	90	19	5.140	13.860	6	13	+0.860
St. Paul	304	13	14.984	(1.984)	15	(2)	+0.016
St. Vladimir	213	16	10.798	5.202	13	3	+2.202
St. Martin	298	16	14.708	1.292	16	0	+1.292
St. Boniface	321	13	11.626	1.374	13	0	+1.374

Table 2.4 (cont'd)
UTILIZATION COMPARISON BASED UPON ROOM EQUIVALENTS

A. SCHOOL	B. F.T.E. SEPT. 30/80	C. ROOMS AVAILABLE	D. P.U.F. ROOM EQUIVALENTS	E. EXCESS SPACE P.U.F. (C-D)	F. SCHOOL NEEDS FORMULA ROOMS	G. EXCESS SPACE SCHOOL NEEDS FORMULA(C-F)	H. CLASSROOM DIFFERENTIAL (F-D)
Our Lady of Victories	190	14	10.522	3.478	11	3	+0.478
Notre Dame	114	14	6.244	7.756	8	6	+1.756
H. E. Beriault	372	24	19.112	4.888	21*	3	+1.888
Annunciation	172	15	8.912	6.088	9*	6	+0.088
Our Lady of Fatima	93	13	5.278	7.722	7	6	+1.722
Holy Cross	345	36	17.870	18.130	22*	14	+4.130
Our Lady of Lourdes	212	15	10.752	4.248	11	4	+0.248
Our Lady of Peace	158	13	8.268	4.732	9	4	+0.732
St. Bernadette	170	10	8.820	1.180	10	0	+1.180
St. Nicholas	271	13	13.466	(0.466)	16	(3)	+2.534
St. Thomas More	250	21	12.500	8.5	13	8	+0.500
TOTALS	11,856	940	606.018	333.982	697	243	90.982

* includes home economics and industrial arts rooms
* F.T.E. means Full Time Enrollment equivalents
** P.U.F. means Provincial Utilization Formula

The reason for this difference is that the School Needs Formula is based upon the actual number of classrooms and number of classes of students in each school within the system, while the Provincial Utilization Formula* is based upon an assumption that each class which requires a classroom (a classroom being large enough for 25 students) actually consists of 25 full time equivalent enrollments. Unforunately, however, not all classes consist of 25 full time equivalent enrollments. Some classes, such as Early Childhood Services (ECS) consist of 25 or fewer half-time students. Since it is not practical to use an ECS classroom for other programs when it is not used for the ECS program, the School Needs Formula recognizes the requirement of a classroom on a full-time basis for part-time ECS programs, thus counting that classroom as fully utilized. The Provincial Utilization Formula, on the other hand, would calculate the 25 half-time ECS students as 12.5 full-time equivalent enrollments, thus calculating the classroom as 50% underutilized. In fact, there are many classes which, while requiring a room that can accommodate 25 students, in fact have fewer than 25 students.

While space as a half-time ECS classroom, and that used for classes of fewer than 25 students, appears as potential excess space using the assumptions of the Provincial Utilization Formula, such space could not be used by a supplementary user.

The difference between these two calculations of excess space could present a problem should a school district wish to build a new school. When determining provincial capital funding for new schools (see School Buildings Regulation, Part II) the School Buildings Board may take into account a district's current utilization of space. The utilizati on factor is established by determining the relationship between the number of full time equivalent enrollments in the system, to what is referred to as the operational capacity. In establishing the operational capacity, excess space that is leased out to approved supplementary users is deducted from the actual capacity of the school facility. Thus, the more excess space that is rented out, the lower the operational capacity of the schools in a district, and the greater the utilization factor.

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* It should be noted that full time equivalents only apply to elementary and junior high enrollments, not to high school enrollments.

Looking again at the schools in Table 2.4 and assuming that these represented all the schools in a particular district, District X gives an example of how this problem could arise.

The actual capacity of all the 1980 elementary, elementary/junior high schools in District X based upon the information in Table 2.4 , without any deductions for age or currently leased space, but with the deduction of one ancillary room for a school of 500 students or less, and two for a school of 500 or more students, is approximately 21,775 student spaces. If District X were able to organize its programs so that it could use the assumptions of the Provincial Utilization Formula to establish its potential excess space, and if it could rent out all that excess space, its operational capacity would be 13,425* students, rather than 21,775 students.

(*This operational capacity was calculated by converting the total number of excess classrooms, established using the assumptions of the Provincial Utilization Formula which is 333.982 classrooms, into student spaces by multiplying the number of rooms by 25 (assuming 25 students per class) and deducting this from the actual capacity of the schools as established for the schools in Table 2.4)

Using the School Needs Formula, however, and renting out all of the excess space identified, would give District X an operational capacity of 15,700 students, rather than 21,775. Like the first example, this was calculated by converting the total number of excess rooms for the schools in Table 2.4, established by using the School Needs Formula which was 243, into student spaces by multiplying by 25, assuming 25 students per classroom, and deducting this from the actual capacity of the schools in the system.

In other words, if District X were able both to free up all of the potential excess space identified by the assumptions of the Provincial Utilization Formula, and to lease all of the space to supplementary users, it would have a lower operational capacity, than if it were only able to lease the space identified as excess by the School Needs Formula. As illustrated in the following examples, its Utilization Factor (Utilization Factor refers to the uses in Provincial Funding Formula as outlined in the School Buildings Regulations) would be greater using the Provincial Utilization Formula than using the School Needs Formula.

Example A:

i) excess space calculated on the basis of assumptions of the Provincial Utilization Formula

ii) operational capacity assumes all potential excess space is leased

or rented out, and does not include deductions for age

iii) enrollments are full time equivalents at September 30/80, Table 2.4.

$$\text{UTILIZATION FACTOR} = \frac{\text{ENROLLMENTS}}{\text{OPERATIONAL CAPACITY}} = \frac{11,856}{13,425} = .863$$

Example B:

i) excess space calculated on the basis of The School Needs Formula

ii) operational capacity assumes all potential excess space is leased or rented out, and does not include deductions for age

iii) enrollments are full time equivalents at September 30/80, Table 2.4.

$$\text{UTILIZATION FACTOR} = \frac{\text{ENROLLMENTS}}{\text{OPERATIONAL CAPACITY}} = \frac{11,856}{15,700} = .755$$

In general then, where utilization is an issue, if District X were in the position to use the assumptions of the Provincial Utilization Formula to establish excess space, and were able to lease out all of this excess space, it would be eligible for all of the possible provincial capital funding. However, it is quite probable that District X would, in fact, only be able to lease out the excess space identified by the School Needs Formula, if it continued all its educational programs. In this instance, rather than being eligible for all of the possible funding available from the Province, it could possibly be eligible for a lesser amount. Using the previous example A (in an instance where utilization was an issue, assuming a ratio of the district's equalized assessment per pupil and the provincial equalized assessment per pupil of .85), District X could be eligible for all of the possible provincial capital funding (85% of the approved maximum amount for the type of school facilities being developed). Using the School Needs Formula, in an instance where utilization is an issue, District X would be eligible for a lesser amount of funding. Assuming the same ratio of equalized assessment per pupil, in the previous Example B, District X would be eligible for only 75.50% of the possible capital funding.

Thus, in this example and depending upon both the district and the province's per pupil assessment, a district renting/leasing excess space calculated to the School Needs Formula could have 9.5% shortfall of capital funding. To illustrate this a

different way, where a school facility would cost $700/square meter, the district would only be eligible for $543/square meter, rather than $595/square meter. The district in this example, would have to raise an additional $157/square meter rather than $105/square meter.

It should be noted that, in reality, this discrepancy may not be as great as the example suggests, since in calculating operational capacity for the purposes of establishing the utilization factor the province allows capacity deductions for age. For example, a school building or part thereof that is of woodframe construction and is 35 years or older is not considered part of the operational capacity. These age deductions will result in reduced operational capacity. The School Needs Formula, on the other hand, considers all school buildings that are considered by the school board to be in a condition suitable for educational or other uses as part of its potential operational capacity. Thus, while the School Needs Formula may result in more space being used for educational purposes than is indicated by the Provincial Utilization Formula, it also recognizes a larger pool of available space. Thus, depending on class configurations and age of school facilities, a discrepancy in the utilization factors derived using the School Needs Formula and using the Provincial Utilization Formula, may not, in fact, exist, or if it does exist, may, even in the District X example, be less than 9.5%.

In 1980, the schools listed on Table 2.4 had an allowable deduction of 950 student spaces which would reduce the operating capacity from 15,700 student spaces to 14,750 student spaces. With an enrollment of 11,856 students, the utilization ratio would be .804, an increase of nearly 5%.Therefore,even in the District X example, the age deduction would reduce the funding discrepancy from 9.5% to 4.6%. Using the previous value of $700.00/sq. meter, the age reduction would then increase the amount of funds available to $564.00 from $543.00.

In addition, this discrepancy may not exist in jurisdictions where the class configuration and program requirements using the School Needs Formula parallel those of the assumptions of the Provincial Utilization Formula.

In the case of the ESSB, however, the use of the Provincial Utilization Formula to identify potential excess space does not result in the identification of space that could be made available to supplementary users. For example, the fractions of classes identified as excess are of no use to a supplementary user, and in all cases are being used for educational purposes.

While there could be the possible loss of Provincial capital funding, it is suggested the School Needs Formula, or some modification thereof, will provide a district with the identification of potential excess space, that is effective in that it can be used by a supplementary user, while the Provincial Utilization Formula will only provide an indication of potential

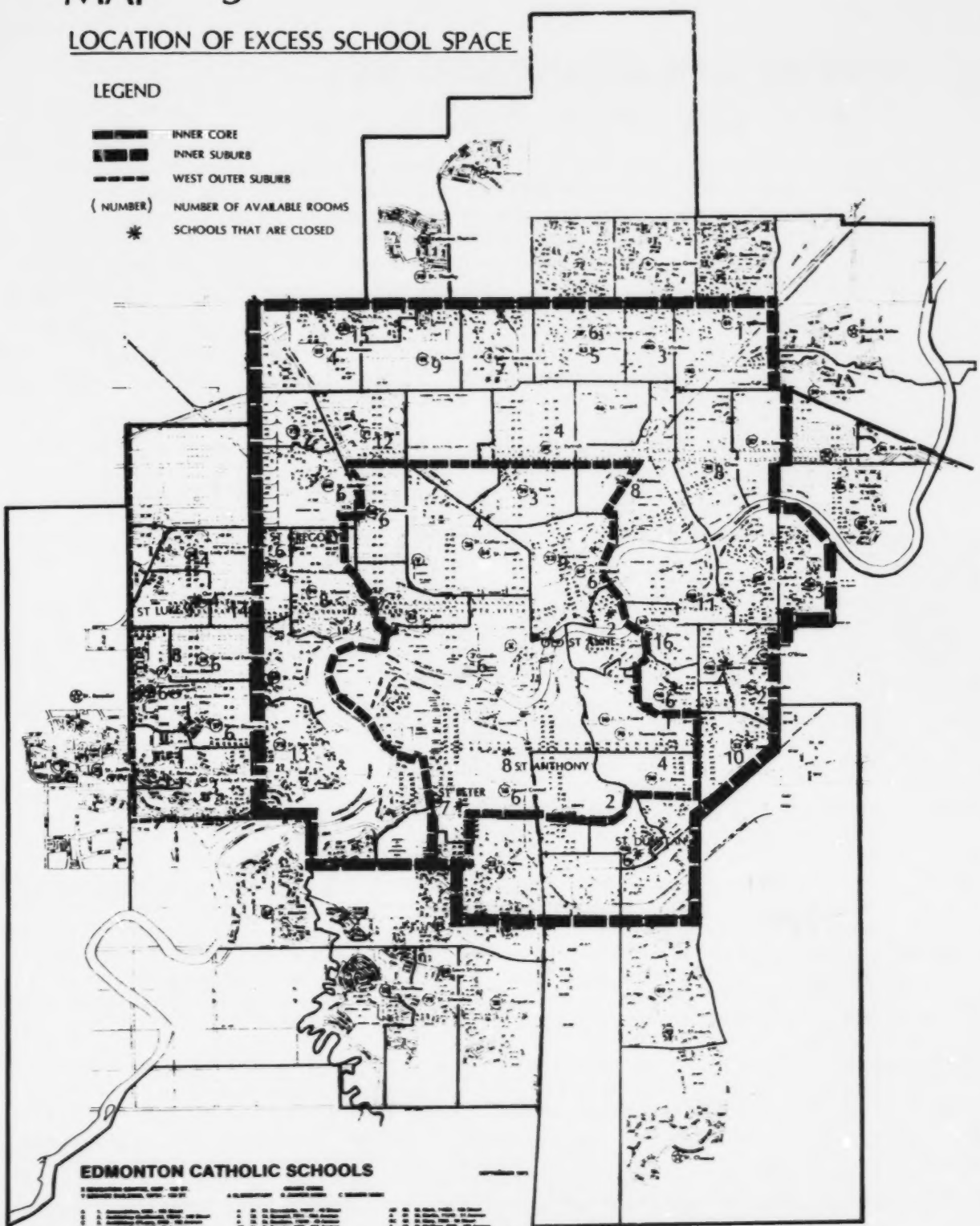
excess space. It is also suggested that when it is identifying excess space, that a district should analyze the possible effect on its potential capital funding. If a substantial discrepancy exists between potential and actual funding because of current utilization of excess space, it is suggested that as a district develops its stragegy for the management of excess space, it consider developing a strategy for the effective utilization of all school facilities, since in reality it is the use and management of school facilities that affects its utilization ratio rather than the formula it uses to identify excess space for use by supplementary users.

In summary, the effective utilization of existing school facilities is one of the factors that should be taken into account by the District as it plans for the utilization and management of excess space.

Since the focus of this study is directed to the supplementary use of excess school space, such space must be able to be used by a supplementary user. Therefore, for the purposes of this study, the School Needs Formula was used to define excess space within the system.

MAP 3

LOCATION OF EXCESS SCHOOL SPACE



SOURCE: E.S.S.B. ENROLLMENT FIGURES 1970 - 71 1980 - 81

C. NATURE AND CONFIGURATION OF EXCESS SPACE

1. CURRENT EXCESS CONFIGURATION AND LOCATION

As illustrated on Map 3, current excess space is located in the inner core, inner suburban and west outer suburban areas. Of the 50 schools that have excess space, 14 are located in the inner core, 26 in the inner suburban communities and 10 in the west outer suburban communities. (For a detailed breakdown of excess space, see Appendix II, Chapter 2.)

In the inner core, of the 11 open schools with excess space, 9 have an excess of 6 or fewer classrooms. Of these, 1 school has 2 excess classrooms, 1 has 3 excess rooms, 2 have 4 rooms, 1 has 5 excess rooms and 4 have 6 rooms.

In the inner suburbs, on the other hand, only 11 of the 20 currently open schools have 6 or fewer excess classrooms, while 9 of the 20 schools have an excess of 7 or more rooms. Of these 9, 2 had 8 rooms, 2 had 9 rooms, 1 had 12 rooms, 2 had 13 rooms, 1 had 15 rooms and 1 had 16 rooms which were excess.

The pattern in the west outer suburbs is similar to that of the inner core areas, where 7 of the 9 open schools had an excess of 6 or fewer rooms, of which 2 had an excess of 3 rooms, 2 had 4 excess rooms, and 3 had 6 excess rooms.

Currently, then, the vast majority of excess space that is available is in schools that are still functioning as schools, and is in groups of 6 or less classrooms.

This configuration of current excess space limits the potential supplementary users. For example, users such as prime offices, possibly housing and a variety of resource centres, social service centres, retail operation and some commercial operations may be inhibited from becoming functional supplementary users of excess space, either because they cannot share a school facility with an existing school or because the space available is too small to consider economic or efficient conversion. (See Section III, Potential Users and Their Requirements.)

The problem of matching the group's space requirements with that of available excess school space is illustrated by the fact that, as of October 15, 1980, the district had a record of 21 unsuccessful applicants. Three of these applicants withdrew their applications either because they had found other space, or because they had decided to cancel their program due to lack of applicants. Two other applicants, both of which were private organizations, were not considered acceptable by the administration. The remaining 19 applicants were unsuccessful because space was not available. In some instances, space was not available because the group required all of the rooms in a school, and no entire school

was available. The room requirements for the other groups ranged from 1 - 10 rooms. For these groups, the amount of space was either not available, or the space they needed was not available in the location desired by the group.

2. FUTURE EXCESS SPACE - CONFIGURATION AND LOCATION

In order to determine potential future excess space within the district, three enrollment estimates were done for each of the three areas that had a high proportion of excess space: the inner core communities, the inner suburban communities and the west outer suburban communities. In all cases, the 0 - 6 1980 Civic Census Data was used as the basis of the enrollment estimates. All of the estimates assumed a 100% grade retention rate. The first of the three estimates for each area assumed no population growth due to immigration/migration; the second assumed population growth, but limited population retention, and the third assumed population growth and complete retention of the new population.

Based upon these three enrollment estimates for each of the areas, a range of potential number of excess rooms was determined. This was done by dividing the estimated difference in enrollments between the 1980/81 - 1985/86 school years for each area by 25. This provided a base number of classrooms. Eighty percent of this base number was used as the possible number of classrooms. The 80% factor represents the approximate difference between potential excess student spaces and actual excess rooms that could be available. For a complete review of enrollment estimates, see Appendix II, Chapter 2 .

Table 2.5 indicates the total possible excess space in the inner core, inner suburbs, and west outer suburbs by 1985.

TABLE 2.5 POTENTIAL EXCESS SPACE INNER SUBURBAN AND OUTER SUBURBAN AREAS

	INNER CORE			INNER SUBURBS			WEST OUTER SUBURBS		
	ENROLLMENT ESTIMATE								
	High	Middle	Low	High	Middle	Low	High	Middle	Low
Potential	7	15	20	44	45	52	7	8	10
Current	76	76	76	190	190	190	63	63	63
TOTAL	83	91	96	234	235	242	70	71	73

As previously illustrated in Map 3, excess space is not evenly distributed among all of the schools within the inner core, inner suburban or west outer suburban areas. Although all of the schools reviewed, with the exception of schools which offer special programs, had decreasing enrollments, the rate of decrease was much faster in some communities than others. While curent and future population and enrollment estimates provide an overall indication of trends in enrollments throughout the areas reviewed, they are not accurate nor detailed enough to determine the possible rate of decline for a particular school within a particular neighbourhood. Therefore, any strategy for the management of excess space must include a detailed review of each neighbourhood to determine what the possible future might be for each school within an area.

III. POTENTIAL USERS AND THEIR REQUIREMENTS

A. USER GROUPS

In order to determine the potential users of space within the Edmonton Separate School District, the approach was to begin from the position that all possible activities were potential users of the excess space. The following list of potential users was developed from the review of the experience of other jurisdictions and from contacts with potential users.

Educational Uses (Public and Private)

- -special schools (children requiring a special learning environment)
- -adult education
- -religious based schools

Child Care (Public and Private)

- -day care
- -after school care
- -nursery schools/playschools

Recreational/Cultural (Public and Private)

- -special educational/recreational programs (eg. ballet school, music centre, crafts centre)
- -district recreational or cultural centre

Offices (Public and Private)

- -prime offices
- -project offices
- -resource centre offices, social service centre offices, health clinics, multi-service centres
- -senior citizen centres

Commercial

- -small scale light industry

Retail

- -neighbourhood commercial
- -theatres, restaurants

Heavy Industry

Housing (public and private)

- -senior citizen apartments
- -senior citizen lodges
- -family housing
- -apartment housing
- -group homes

On review of this preliminary list of potential users, only heavy industrial uses were eliminated, because of code requirements and because of the location of most school facilities in the middle of residential areas, thereby severely limiting the possibility of industrial development. The remainder of the uses were considered potential supplementary uses. In order to establish particular user requirements and to identify whether certain uses would be acceptable to the community, current users and potential users of excess space were contacted. Information on their requirements was sought either by personal interview or by a self-administered questionnaire. In addition, self-administered questionnaires were sent to the Presidents of all the Community Leagues in the inner core, inner suburban and west outer suburban communities. Copies of the questionaire and interview forms are contained in Appendix I.

B. USER GROUP REQUIREMENTS

As illustrated in Table 2.6, the more the supplementary use diverges from the original use as a school, the more complex the user requirements.

The accommodation of uses such as special schools for children or adults, religious schools, day care, after school care and nursery or playschools will all be relatively easy, since most of these uses require minor or intermediate physical alterations and could be housed in a facility still being used as a school. They could be located in the inner core, inner suburban, or outer suburban communities, and would probably meet with little or no neighbourhood resistance. The accommodation of prime offices, on the other hand, may be more difficult since the use would not be permitted in the Urban Service District unless the purpose is a government service; major physical alterations to the mechanical and electrical systems would be required; the preferred location for such offices tends to be in the central area of the city; this use would probably not be compatible in a facility that is still functioning as a school, and would most likely meet with neighbourhood resistance.

The accommodation of such uses as recreational/cultural centres, social services project offices, health clinics, resource centres and senior citizen centres, while slightly more complex than schools, day care, etc., will still be less complicated than prime offices. While some of these activities will require more physical modification than others, the extent of these modifications would usually be modest. The locational requirements of these classes of users will be dependent upon the nature of their program. Most of these types of uses could locate in any area or in the inner core. Again, depending upon the specific nature of the activity, these uses may be either permitted or discretionary uses, and could possibly be accommodated in a school that is still providing educational services. Depending upon the neighbourhood, the nature of the activity of this particular use, and the consequent impact of the activity on the community (e.g. traffic increase, parking

overspill, etc.) some of these supplementary uses might encounter neighbourhood resistance.

Retail and commercial uses would be difficult to accommodate. These uses are neither permitted nor discretionary uses in the Urban Service District and would require re-districting. They would also require physical alterations, and, depending upon the nature of the commercial activity, intermediate and possible major physical alterations would be required. Retail activities, unless of the neighbourhood convenience variety, would probably require a location that is surrounded by other commercial uses. Retail activities and most commercial activities would probably not be compatible with continued educational use. Like prime offices and some of the other uses, retail and commercial activities could meet with community resistance.

Housing, like prime offices, retail and commercial uses would be difficult to accommodate. Of all the uses, housing requires the greatest physical modification to be accommodated. With the possible exception of senior citizen housing, it is not a permitted nor a discretionary use and would require re-districting. Location requirements are dependent upon the type of housing and the needs and requirements of the particular client group to be served by the housing. It may be, depending upon the legal requirements of the financier, and the economic requirements of the housing sponsor, that the housing could be accommodated in a school that is still being used for the education of children. However, it is more likely that the development of housing would require a closed school. It is also probable that the development of housing would meet with neighbourhood resistance. Unlike the majority of the other types of users which generally require a five year lease, housing would require a minimum lease term of 25 years.

Many of the requirements of the different user groups, such as the degree of physical modification, the length of tenure, or land use by-law modifications, may be considered constraints to the use of excess school space by supplementary users. All such constraints need to be addressed as part of the overall strategy for the management of excess space.

TABLE 2.6 SUPPLEMENTARY USES
: USER REQUIREMENTS AND COMMUNITY ACCEPTANCE

USER REQUIREMENTS		TYPES OF USERS: Special Schools for Children	Special Adult Schools	Daycare	Afterschool Care	Nursery/Play School	Special Ed/Rec Programs	District Rec/Cultural Centre	Prime Offices	Project Offices	Resource Centres/Senior Citizen Centres/Social Services	Churches	Industrial/Commercial	Retail	Senior Citizen Apartments	Senior Citizen Lodges	Family Housing/Apartments	Group Homes	Religious Schools	
PHYSICAL MODIFICATIONS	MINOR - telephone, interior finishes	●	●			●				●									●	
	INTERMEDIATE - partitioning to new needs		●[1]	●	●		●				●	●								
	MAJOR - HVAC, structural.							●	●		●		●	●	●	●	●	●		
LOCATION	CENTRAL CITY								●		●[3]									
	DEPENDS UPON PROGRAM & CLIENT	●[2]	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●[4]	
ACCESS	PROXIMITY TO PUBLIC TRANSIT			●	4	●	5	●	●	●	●	●	●	●				6	●	
	GOOD VEHICLE ACCESS	●	●	●	4	●	5	●	●	●	●	●	●	●	●	●	●	6	●	
CHARACTERISTICS OF SURROUNDING AREA	RESIDENTIAL				●	●									●	●	●	●		
	COMMERCIAL/RETAIL								●				●	●						
	NOT IMPORTANT	●	●	●			●	●		●	●	●							●	
TERM (length of lease)	LESS THAN 1 YEAR					●[5]														
	1-4 YEARS									●										
	5 YEARS	●[7]	●	●	●		●	●	●		●								●	
	DEPENDS UPON COST OF IMPROVEMENTS	●[8]		●[8]					●[6]	●[6]	●[6]	●	●	●			●[8]			
	25 + YEARS														●	●	●	●		
ABILITY TO PAY FOR IMPROVEMENTS AND RENT.	HAS FUNDS	●[7]	●						●	●			●	●	●	●	●	●		
	WOULD HAVE TO RAISE FUNDS	●[8]		●	●		●	●			●	●							●	
	NO FUNDS					●														
SPACE REQUIRED	WOULD NOT SHARE WITH FUNCTIONING SCHOOL								●					●		●			●	
	COULD POSSIBLY SHARE WITH SCHOOL		●				●	●		●	●	●	●		●		●	●		
	COULD SHARE WITH FUNCTIONING SCHOOL	●		●	●	●														
LAND USE	PERMITTED	●	●	●	●	●	●		●[6]	●[6]	●	●							●	
	DISCRETIONARY							●			●									
	REDISTRICTING REQ'D								●[6]	●[6]			●	●	●	●	●	●		
COMMUNITY ACCEPTANCE	PROBABLY NOT MEET RESISTANCE	●		●	●	●	●												●	
	POSSIBLY MEET WITH RESISTANCE		●					●		●	●									
	WOULD MEET WITH RESISTANCE								●			●	●	●	●	●	●	●		

Footnotes to Table 2.6

Supplementary Uses: User Requirements and Community Acceptance

1. if special requirements
2. close to support facilities
3. close to support facilities
4. not important if serving local community
5. not important if serving local community as well as region
6. depends upon group being served
7. public
8. private
9. renewable
10. only if primarily a service activity
    does not include purely administrative activities
11. if serving entire city

IV. CONSTRAINTS

Based upon our survey of the problems of other jurisdictions, our review of the E.S.S.B. current and potential excess school space and user requirements, as well as requirements placed on the use of excess space by the expectations and policies, of the provincial government, the municipal government, the community and the board itself, we have identified the following categories of constraints to supplementary use of excess space.

A. The nature of excess space

- -location and configuration of current and future excess space
- -character of the adjacent communities
- -proximity to public transit
- -building codes

B. Physical and development regulations

- -scope and nature of the architectural, structural, mechanical, and electrical modifications required to accommodate different supplementary uses
- -land use controls

C. Legal and policy

- -current board policy regarding supplementary users
- -current board requirements and lease arrangements
- -current provincial legislation and regulations
- -current contractual obligations between the school board and the City of Edmonton (Joint Use Agreement)

D. Economic

- -cost of modification
- -availability of financing for the conversion of school facilities

E. Neighbourhood expectations regarding supplementary use of excess school space

F. Requirements of reconversion to school use

A. NATURE OF EXCESS SPACE

1. LOCATION & CONFIGURATION

As detailed in Section II.C., at this time excess space is unevenly distributed among the inner core, inner suburban, and west outer suburban schools. However, the majority of this excess space exists in configurations of 6 or fewer classrooms. This limited configuration of excess space reduces the range of

potential supplementary uses to those which can operate in 6 or fewer classrooms in facilities which are functioning as school facilities.

This uneven configuration of excess space has resulted primarily from the changes (shrink/shift) in enrollment patterns over the past ten years. Such enrollment pattern changes, if uncontrolled, often result in exactly this pattern, with excess space becoming available, at first, in groups of one or two rooms in several schools within a region. Subsequently, excess space in any particular school often increases until closure seems the only option available. During this period, it is possible that the range of supplementary users using space within particular schools and within the total system will broaden as more space becomes available. As entire schools become available, districts look toward users requiring the use of total facilities, and may make such facilities available on a long term basis. Alternately, school districts may sell schools which become completely empty. Allowing patterns of declining enrollment to establish the pattern of space used for education and available for supplementary use not only limits the range of possible users, but also does not ensure that available space is most appropriate to either type of user's purpose. Space used for education may not be the most economical to operate, nor the most flexible or adaptable to changing educational needs. On the other hand, there is no guarantee that the space not used for education is the space with the most potential for supplementary uses. Finally, the space which becomes available because of school closures may not, in fact, be the most appropriate to make available on a long term basis since patterns of past enrollment decline may reverse themselves, thereby creating a demand for school facilities before the expiration of a long term lease.

The District does, however, have the option of determining, at least in part, how excess space might be distributed by reviewing the possibility of some school consolidation or program re-organization. However, a major constraint to a district's ability to determine the distribution of excess space through such measures is the expectations of parents with children enrolled in the system. Since the "raison d'etre" of the school district is the provision of appropriate K - 12 education for the children of its supporters, it might appear as though the board were abdicating its responsibilities if it began a process of consolidation for the apparent purposes of ensuring "marketable" excess space for supplementary users. Thus, if consolidation is to be considered as a realistic option, it must be done with the involvement of parents with its prime objective being the effective and efficient delivery of educational services to the pupils within the system.

2. CHARACTER OF ADJACENT COMMUNITIES

Much of the current excess space is in the inner suburban and west outer suburban areas and surrounded by residential

development . A number of constraints exist as a result of this type of location. For example, users such as prime offices and city wide resource centres require central locations, and would rarely be interested in locating in inner suburban or outer suburban communities. While project offices and a variety of other centres, whether district or regional, and some commercial or retail operations, might desire such outer/inner suburban locations, the nature of their activities often would increase traffic into the neighbourhood or result in overspill of parking onto residential streets.

Often then, school sites centred in residential neighbourhoods, particularly in outer/inner suburban neighbourhoods are more suitable for community based uses, such as recreation centres, playschools/nurseries, after school care, neighbourhood day care, neighbourhood based resource centres, health clinics, cultural centres and residential uses than they are for offices, regional day care, regional resource centres, churches, retail and commercial uses.

3. PROXIMITY TO PUBLIC TRANSIT

In spite of the fact that most schools are located centrally to residential communities, public transit routes are usually within a two to three block distance. Although all of the schools may not be equally accessible to residents from surrounding neighbourhoods and from the city at large, the current direction of City of Edmonton transit planning is to establish regional transfer points likely to increase accessibility of schools within a region to residents of surrounding areas. However, access by public transit may remain difficult depending upon both the location of the school and the departure point of the person travelling. For example, persons travelling from northwest inner suburban areas to southeast inner suburban areas may be required to transfer at least once. Transportation time and the number of transfers required per trip could both act as deterrents to potential clients of uses serving a city-wide clientele. This could result in negative impacts either on the supplementary use because of reduced numbers of clients, or on the neighbourhood because of an increase in the numbers of private automobiles entering the neighbourhood. The eventual development of the south and west legs of the rapid transit lines should increase access to schools in these areas via public transit.

B. PHYSICAL AND DEVELOPMENT REGULATION

1. THE PHYSICAL PLANT--CONSTRAINTS

School facilities traditionally consist of a number of general purpose classrooms and support spaces, including science laboratories, libraries, industrial arts and home economic facilities, washrooms, and so on. For a variety of program and policy reasons, the classrooms tend to be standardized in terms

of size, shape, and facilities. The school buildings are usually situated on sites which provide facilities for a variety of outdoor recreation activities both during and after school hours. In addition, the school grounds are frequently a major outdoor recreation resource in the community. The school sites are usually surrounded by family type housing--a planning pattern typical of many of Edmonton's neighbourhoods.

The adaptability and flexibility of school buildings to supplementary uses will, in part, be dependent upon the characteristics of the physical plant, in part on the characteristics of the adjacent neighbourhood, and in part, upon municipal planning controls and building codes which regulate development and uses on school sites. For purposes of analysis, adaptability has been defined as the suitability of the existing facilities for other uses. This will be determined by room sizes, the compatibility of mechanical and electrical requirements (distribution and quality) of supplementary uses with the existing systems, the building code requirements in terms of types of excess space within the school, the requirements for access to the space and control over the space. Flexibility has been defined as the ease and/or feasibility of modifying the facilities and support systems and of amending the regulations and policies which affect the types of uses allowed.

To analyze the constraints due to the facilities and to the development regulations, potential uses identified earlier have been grouped into the following categories:

GROUP A - THOSE USES WHICH REQUIRE MINIMAL MODIFICATIONS TO THE EXISTING PLANT OR TO DEVELOPMENT REGULATIONS AND WHICH MAY OR MAY NOT BE OF A SIMILAR OCCUPANCY CATEGORY AS EXISTING USES.

- -special schools - children requiring a special learning environment
- -adult education
- -private religious based schools
- -day care (public/private)
- -after school care
- -nursery school/play school
- -special education/recreation programs (ballet schools, music centres/schools, craft schools
- -district recreational/cultural centres
- -churches

GROUP B - THOSE USES WHICH REQUIRE HIGH STANDARDS OF MECHANICAL AND ELECTRICAL SERVICES AND A VARIETY OF SPACE SIZES

- -prime offices
- -project offices
- -resource centres, senior citizen centres, multi-purpose centres, social service centres, health clinics
- -commercial (printing, workshops, small scale industry)

-retail

GROUP C - THOSE USES WHICH REQUIRE EXTENSIVE MODIFICATIONS, DECENTRALIZED PLUMBING SERVICES, UNIT CONTROLLED HEATING AND ELECTRICAL SERVICES

-senior citizen housing (apartments)
-senior citizen lodges
-family housing
-group homes

As Table 2.7 indicates the existing schools represent a variety of plan forms and structural systems. The constraints to supplementary uses posed by these physical plant systems will be largely determined by the program requirements of the proposed uses. If the program requirements are compatible with those upon which the original design and systems were based, modifications will likely be minimal. If, however, the program requirements of the proposed supplementary use require extensive subdivision of space, re-organization of space, or up-grading of structural, mechanical, or electrical systems, such uses may be ultimately considered incompatible with the long term interests of the system.

TABLE 2.7 : INVENTORY OF SCHOOL FACILITIES

ELEMENTARY SCHOOLS	STRUCTURAL SYSTEM			LOWER FLOOR CONSTRUCTION		PARTITION SYSTEM				PLAN FORM			NUMBER OF STORIES			WINDOW TYPES	
	MASONRY BEARING	POST & BEAM	WOOD FRAME BEARING	SLAB ON GRADE	CRAWL SPACE	WOOD FRAME NON-BEARING	MASONRY NON-BEARING	WOOD FRAME BEARING	MASONRY BEARING	LINEAR	COMPACT	COURT YARD	1	2	3	WINDOW WALL	VERTICAL
ANNUNCIATION	●			●		●			●		●		●				●
FATHER LACOMBE	●			●					●	●			●	●		●	●
GRANDIN	●			●				●	●	●				●*		●	
NOTRE DAME	●			●				●	●	●			●			●	
OUR LADY OF FATIMA	●		●	●		●		●	●	●			●	●		●	
OUR LADY OF LOURDES	●		●	●		●		●	●	●			●	●		●	
OUR LADY OF VICTORIES	●			●		●			●	●			●			●	●
ST AGNES			●		●	●		●		●			●	●		●	
ST ANDREW			●	●	●			●		●			●			●	
ST ANGELA	●	●		●		●	●		●	●	●		●	●		●	
ST BEDE	●			●					●	●			●			●	
ST BERNADETTE	●			●					●	●			●			●	
ST GERARD		●		●		●				●			●	●		●	
ST JOHN	●		●		●			●			●		●	●		●	
ST MATTHEW	●	●		●		●			●	●	●			●		●	
ST MICHAEL			●	●	●			●			●	●	●			●	
ST RITA	●			●					●	●			●			●	●
ST THOMAS AQUINAS			●		●			●		●			●	●		●	
ST MARGARET		●			●	●				●			●			●	
* BASEMENT WITH SCHOOL FACILITIES																	

TABLE 2.7: INVENTORY OF SCHOOL FACILITIES cont'd

ELEMENTARY/ JUNIOR HIGH SCHOOLS	STRUCTURAL SYSTEM			LOWER FLOOR CONSTRUCTION		PARTITION SYSTEM				PLAN FORM			NUMBER OF STORIES			WINDOW TYPES	
	MASONRY BEARING	POST & BEAM	WOOD FRAME BEARING	SLAB ON GRADE	CRAWL SPACE	WOOD FRAME NON-BEARING	MASONRY NON-BEARING	WOOD FRAME BEARING	MASONRY BEARING	LINEAR	COMPACT	COURT YARD	1	2	3	WINDOW WALL	VERTICAL
H.E. BERIAULT	●	●		●			●		●	●	●			●*		●	●
HOLY CROSS	●	●		●			●		●	●				●*		●	●
MOUNT CARMEL	●	●		●		●	●				●	●	●	●		●	●
OUR LADY OF PEACE		●		●			●			●			●			●	●
SACRED HEART		●		●			●			●				●		●	●
ST. ALPHONSUS	●			●							●	●		●*		●	●
ST. BASIL		●		●			●			●	●			●		●	●
ST. BRENDAN	●			●			●		●	●			●	●		●	●
ST. CATHERINE	●	●			●	●				●				●		●	
ST. CLARE		●		●	●	●	●			●			●	●		●	●
ST. EDMUND		●	●		●	●	●	●		●		●		●		●	●
ST. FRANCIS OF ASSISI		●	●	●		●					●	●	●	●		●	●
ST. GABRIEL	●			●			●		●	●		●	●	●		●	●
ST. JAMES		●		●	●	●				●				●		●	
ST. JEROME	●			●		●			●		●		●				●
ST. KEVIN		●		●			●			●	●		●	●		●	●
ST. LEO	●		●	●					●	●			●			●	
ST. MARK	●	●		●					●	●			●			●	●
ST. NICHOLAS		●		●			●			●			●			●	
ST. PATRICK	●	●		●	●	●	●		●		●			●		●	●
ST. PAUL		●			●		●			●				●		●	
ST. PIUS X	●	●		●	●		●		●	●			●	●		●	
ST. ROSE		●		●			●				●			●			●
ST. VINCENT	●	●		●	●	●	●			●			●			●	●
ST. VLADIMIR	●			●			●		●		●		●				●
* BASEMENT WITH SCHOOL FACILITIES																	

TABLE 2.7: INVENTORY OF SCHOOL FACILITIES cont'd

SCHOOLS	STRUCTURAL SYSTEM			LOWER FLOOR CONSTRUCTION		PARTITION SYSTEM				PLAN FORM			NUMBER OF STORIES			WINDOW TYPES	
	MASONRY BEARING	POST & BEAM	WOOD FRAME BEARING	SLAB ON GRADE	CRAWL SPACE	WOOD FRAME NON-BEARING	MASONRY NON-BEARING	WOOD FRAME BEARING	MASONRY BEARING	LINEAR	COMPACT	COURT YARD	1	2	3	WINDOW WALL	VERTICAL
JUNIOR HIGH																	
ST. CECILIA		●		●		●	●				●			●*		●	
ST. THOMAS MORE	●			●			●		●		●		●	●			●
SIR. JOHN THOMPSON	●			●		●			●		●			●			●
CLOSED SCHOOLS																	
ST. ANTHONY		●	●	●	●			●	●	●			●	●*		●	●
ST. BERNARD		●		●					●	●			●			●	●
ST. BRIDE	●		●		●		●			●			●*			●	●
ST. DUNSTAN	●			●*					●	●			●			●	
ST. GREGORY		●		●			●			●			●			●	
ST. HELEN			●		●			●		●			●			●	
ST. JOAN	●			●					●		●		●				●
ST. LUKE		●	●	●				●		●			●			●	
ST. PETER		●			●	●				●			●			●	

* BASEMENT WITH SCHOOL FACILITIES

Table 2.8 provides a preliminary summary intended to identify the nature of the constraints. It only indicates the potentials, opportunities, and limitations presented by facilities and regulations to partial or total conversion of school space to supplementary uses. A detailed analysis would be required for any particular school each time a new conversion is contemplated in order to ascertain the feasibility of that particular conversion. The detailed analysis, in addition to including the types of constraints reviewed below, should analyze the age and condition of the structure and support systems.

TABLE 2.8 : SUMMARY OF PHYSICAL CONSTRAINTS TO SUPPLEMENTARY USES

POTENTIAL SIGNIFICANCE OF PHYSICAL CONSTRAINTS
○ PROBABLY INSIGNIFICANT
◐ MODESTLY SIGNIFICANT
● SIGNIFICANT

		GROUP A									GROUP B					GROUP C				
		SPECIAL SCHOOLS - CHILDREN	SPECIAL ADULT SCHOOLS	PRIVATE RELIGIOUS SCHOOLS	DAY CARE	AFTER SCHOOL CARE	NURSERY/ PLAY SCHOOL	SPECIAL EDUCATION / REC'N	REC'N / CULTURAL CENTRES	CHURCHES	PRIME OFFICES	PROJECT OFFICES	RESOURCE / SEN. CIT. CENTRES	INDUSTRIAL/COMMERCIAL	RETAIL	SENIOR CITIZEN APTS.	SENIOR CITIZEN LODGES	FAMILY HOUSING	GROUP HOMES
BUILDING CONSTRUCTION	STRUCTURAL																		
	MASONRY BEARING	○	○	○	◐	◐	◐	○	◐	○	●[1]	○	●[1]	●[1]	●[1]	●	●	●	●
	WOOD BEARING	○	○	○	◐	◐	◐	○	◐	○	●[1]	○	●[1]	●[1]	●[1]	●	●	●	●
	POST & BEAM	○	○	○	○	○	○	◐	○	○	◐	○	◐	◐	◐	◐	◐	◐	◐
	LOWER FLOOR CONSTRUCTION																		
	SLAB ON GRADE	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	○	◐	◐	◐	●	●	●	●
	CRAWL SPACE	○	○	○	◐	◐	◐	○	◐	○	◐	◐	◐	◐	◐	●	◐	◐	◐
	EXTERIOR WALL CONST'N	DEPENDS UPON MODIFICATIONS					QUALITY OF EXISTING HEATING, VENTILATION, & CONST'N TO									SCOPE OF HUMIDITY			
	MECHANICAL	◐	◐	◐	◐	◐	◐	◐	◐	◐	●	◐	●	●	●	●	●	●	●
	PLUMBING	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	●	●	●	●
	FIRE PROTECTION	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
	ELECTRICAL	◐	◐	◐	◐	◐	◐	◐	◐	◐	●	◐	●	●	●	●	●	●	●
BUILDING FORM	PLAN FORM[2]																		
	LINEAR	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	COMPACT	○	○	○	○	○	○	○	○	○	◐	◐	◐	◐	◐	●	●	●	●
	COURT YARD	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	BUILDING HEIGHT	PRIMARILY A CONSTRAINT WITH RESPECT TO PARTIAL CONVERSIONS																	
	WINDOW TYPES[3]	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	●	●	●	●
	STYLE / IMAGE	○	○	○	○	○	○	○	○	○	○	○	○	○	○	●	●	●	●
NOTES	1. MAY BE INAPPROPRIATE FOR SOME PROGRAM REQUIREMENTS																		
	2. PRIMARILY A CONSTRAINT WITH RESPECT TO PARTIAL CONVERSIONS																		
	3 DEPENDS UPON MECHANICAL SYSTEMS																		

2. SITE CONSTRAINTS

Development of school sites tends to be limited to the building, grassed and/or hard surfaced playing fields, some playground equipment, necessary walks to link the building entrances to public sidewalks, bicycle stands, staff parking, and in many instances, perimeter fencing. There is usually little, if any, landscaping other than the grassed surfaces and some shrubbery at the entrances.

Conversion of school facilities to supplementary uses may require separation of the sports fields from the site immediately around the building. Conversion may also require upgrading of the landscaping, and demarcation of privacy areas. For example, the City of Edmonton Land Use Bylaw No. 5996 now requires private outdoor amenity areas for each dwelling unit, and separation spaces in front of habitable rooms for some residential districts.

Conversion will require upgrading of vehicular parking facilities to the current requirements of the Land Use Bylaw for the particular category of use unless these are relaxed by the Development Appeal Board.

3. LAND USE CONTROLS

School sites are classified as Urban Service Districts under the City of Edmonton Land Use Bylaw 5996. The purpose of this district is

> *to provide a district for public and privately owned facilities of an institutional or community service nature.*

Currently, no specific development regulations have been prepared for Urban Service Districts. While there are permitted and discretionary uses defined for the district, a comparison of these permitted and discretionary uses with the groups of potential supplementary uses listed above reveals that

a) all of the permitted uses except government services, public libraries, and cultural exhibits roughly equate to Group A uses. The discretionary uses which in general conform to Group A uses include commercial schools, indoor participant recreation services, and outdoor participant recreation services.

b) the permitted uses which are approximately comparable to Group B uses include government services, public libraries, and cultural exhibits. The discretionary uses which may be categorized as Group B uses include natural science exhibits, protective and emergency services.

c) the only types of residential accommodation currently included in this district are temporary shelter services, and "board and lodging housing for Senior Citizens, where integrated with any other Permitted or Discretionary Use of this District".

Preliminary analysis would indicate that conversion of school facilities to a use which would not comply with the permitted or discretionary uses allowed in the Urban Services District, uses such as housing or commercial, would require re-districting, a process which requires a review and decision by city council. Therefore, at this time, the land use controls definitely present a constraint limiting the range of possible supplementary uses.

4. BUILDING CODES

The Alberta Building Code, 1981, establishes the requirements for ratings of construction assemblies for the separation of uses, for the flammability of materials, and for the protection of openings through separations for mechanical and electrical services.

Some of the primary sections of the Alberta Building Code, 1981, applicable to conversion of schools or portions of schools to other uses include

- Subsection 3.1.2 - Classification of Buildings or Parts of Buildings by Major Occupancy
- Subsection 3.1.3 - Multiple Occupancy Requirements
- Subsection 3.1.4 - Occupant Load
- Subsection 3.2 - Size and Occupancy Requirements for Fire Safety
- Subsection 3.3.1(1)- Separation of Suites

Because of the diversity of construction systems and of potential supplementary uses, each use in each particular school may face different building code constraints. If a facility is to be converted to another use of the same occupancy category as the present use, it may not be necessary to upgrade the building to the current code requirement, since in terms of application of the building code, there has been no change in the occupancy of the facility. If a portion of the building is to be converted to another use or occupancy category, that portion must be upgraded to current code requirements. If a building is to be entirely converted to another use or another occupancy category, the building must be upgraded to the current code requirements. It should be noted that enforcement officers also have the discretion to require the upgrading of a structure regardless of changes in occupancy if conditions are deemed unsafe. Therefore, depending upon the type of use proposed and the construction system of the particular school, the building code could be a constraint limiting the range of potential uses.

C. LEGAL AND POLICY

1. BOARD POLICY WITH RESPECT TO SUPPLEMENTARY USES

Like many other school authorities reviewed, the E.S.S.B. developed a policy and principles for the use of excess space that could limit the range of possible users of that space. In 1978, the board passed the following policy enabling the lease or rental of excess school space. While the policy encourages the lease or rental of space in general, it may limit the range of uses by indicating that uses shall be in accordance with zoning regulations of the city and the regulations of Alberta Education. Possible limitations presented by the zoning regulations and Alberta Education regulations are considered elsewhere in this chapter. The E.S.S.B. policy in respect to leasing is presented below:

> *LEASING OF SCHOOLS*
>
> 1. *When school system buildings are not being used for the provision of education in accordance with the school system programs, these spaces should be rented or leased, if at all possible. This includes space in operating schools which may be declared as surplus.*
>
> 2. *The leasing or renting of all facilities shall be in accordance with the zoning regulations of the city and the regulations of Alberta Education.*
>
> 3. *Regulations setting out the priorities to be followed in the leasing of school space, and the procedure to be followed before entering into a lease shall be approved by the School Board.*
>
> *Source: Edmonton R.C. Separate School District # 7*

Perhaps more significant than clause 2 of this policy in limiting the actual range of supplementary users of excess school space are the following principles which have been established for the rental of excess space:

> *Basic Principles*
>
> 1. *The prime purpose of the school system is for the education of the students.*
>
> 2. *A school will be available for alternate use when the enrollment has declined to the point where it is not practical to operate either academically or economically.*

3. *The first claim for the surplus space, either operated in conjunction with the existing classes or in the total building, would be given to educational program either under the umbrella of the school system or associated with the system.*

4. *All education institutions will be considered if further space exists.*

5. *All remaining surplus space will be leased if acceptable to the district.*

6. *Leasing of school property will be the responsibility of the Chief Superintendent, the Area Superintendents, the Superintendentof Planning and Facilities, and the Secretary-Treasurer. Only in exceptional cases will applications be referred to the Board of Trustees for decision.*

7. *The rate for leasing shall be set annually.*

Procedures for Leasing Unused School Space
Source: Edmonton R.C. Separate School District # 7

These principles, in effect, have established a priority list which places educational users first and other users second, depending upon their acceptability to the school district. While these basic principles are in keeping with the main purpose of the school district, that is the education of K - 12 students, they may limit the range of possible supplementary users. It is our understanding from representatives of the E.S.S.B. administration that these principles have been followed in practice by considering educational uses first, community services second, commercial uses such as offices, stores, and services last. Since the leasing of schools policy was passed four years ago when the amount of excess space was considerably less than it is today, the issue of allowing a broad range of supplementary uses was not overly important. Like school jurisdictions in other parts of Canada and the United States, the board's entrance into the business of leasing or renting excess space was rather cautious and passive.

2. CURRENT BOARD REQUIREMENTS AND LEASE ARRANGEMENTS

a) Marketing Procedures

The actual procedures for marketing excess space may also act as a constraint to some users. Even though applications and marketing under this procedure is to be done through the Educational Facilities Officer (EFO), not all users find out about possible space by contacting this official. Surveys of user groups conducted by the research team indicated that groups servicing the residents of the immediate area, (nursery schools, play schools, after school care, etc.) learned of the excess school space from the principal of the school. In most instances, the first approach of this type of user was to the principal of the school. Other groups, such as resource centres, indicated that they learned of the school space from friends currently using school space, gossip, or the grapevine. In these cases, the first approach was usually to someone on the school board who was known to the group, or to the Area Superintendent. Government users either approached the Educational Facilities Officer directly or were approached by the EFO with information about excess space.

This survey indicated that the lack of a marketing or information strategy to ensure that potential users are aware of available space and the application procedures for that space may limit the range of users. For government users, who have direct contact with school board administrators, and for community groups, who have direct contact with the school, obtaining information about excess space may not be difficult. However, learning of excess space may be quite difficult for other users who have neither direct contact with the administration nor with the school principal.

b) Leasing Arrangements - Length of Tenure

Of the constraints identified with respect to current leasing policies, the central issue is that of length of tenure. Currently, the board has two types of lease agreements. One form of agreement can be termed a short form, which is issued to tenants who have a 10 month or shorter agreement. The other form of agreement is used with tenants who have a maximum of a three year agreement. That the maximum term presently obtainable is three years is a major constraint to many supplementary users.

As outlined in the review of user requirements, different groups had different term requirements. Only playschool/nursery school type users indicated a requirement for tenure agreements of less than one year. The programs of these groups operate concurrently with K - 12 school programs. However, even though these groups indicated that a lease term of less than one year would be acceptable, they nevertheless indicated a need for assurance of the possibility of continually renewing their agreements.

Only project offices, whose operation may vary from one to four years, indicated a requirement for tenure agreements of between one and five years. Most non-residential user groups indicated a

need for a lease term of five years with the option to renew for another five. The reasons given for this requirement were either the need for stability once the group had established its operation, or the amount of money necessary to renovate the facilities to meet the requirements of the use. Within the private market, the five year term with an option to renew for three or five years is a common lease arrangement. If it is the desire of the district to expand its range of potential users, and to attract users who otherwise rent in the private market, its lease terms, rental rates, and product must be competitive in the market place.

Housing requires a substantially longer lease term than any other activities, usually 25 years or longer. In addition to length of term of the lease agreement, residential leases must be able to be used as security for the residential mortgage financing. If private lender financing is to be used, the lease agreement must be transferrable in case of default. In essence, a residential lease would be a land lease with the possibility of a leasehold title transferring to the lessee.

In part, the district's ability to grant lease terms of 5 to 25 years or longer is a matter of its own policies, and as such may be changed. For instance, the District is currently negotiating a five year term with five year renewal with Alberta Housing and Public Works on behalf of one of Alberta Housing and Public Works departmental client groups. However, the District's ability to grant longer term leases is also affected by its ability to predict whether a school facility or the portion that is leased will be required for the education of pupils during the term of the lease. The difficulty of making such predictions increases with each year beyond the immediate five year predictions which can be made on the basis of the community's population of 0-5 year olds and retention rate trends.

In addition to the major item of lease term, there are two other items within the current lease agreement which may be constraints to many potential users.

One of these additional constraints arises from the current lease arrangement in which the lease rate is only determined for the first year. For a number of clients who must prepare their yearly budgets at least six months in advance being unable to predict their coming year's rent rate presents a difficulty. In other cases, tenants prefer a fixed base rent for the term of the lease, as well as some indication of their potential operating costs.

The second of these additional constraints arises from the fact that the tenant is not allowed to assign or sub-lease any or all of the premises. A number of supplementary users, especially private market users, may want the option of subletting or assigning their lease rights.

3. PROVINCIAL LEGISLATION AND REGULATIONS

a) The School Act

i) The Edmonton R.C. Separate School District cannot legally sell, lease, or rent any of its school or portions of schools, without first obtaining the approval, in writing, from the Minister of Education. Section 93 of The School Act provides:

93.(1) Subject to this section, a board may sell, lease, rent or otherwise dispose of any of its personal property or any interest therein.

(2) Subject to this section, a board may, with prior approval of the Minister, in writing, sell, lease, rent or otherwise dispose of any real property or buildings therein.

(2.1) The Minister may by regulation, exempt any class or type of real property from the operation of subsection (2).

(3) Subject to subsection (7), real or personal property of a value exceeding $1000 or likely to be disposed of at a price exceeding $1000, shall be disposed of in accordance with subsections (4), (5) and (6).

(4) The board shall
a) obtain two or more appraisals of the market value of the real or personal property, and
b) request tenders or arrange public auction.

(5) The board shall advertise the disposal of real or personal property in a newspaper circulating in the district or division at least twice before disposal.

(6) The board shall only dispose of the property if the bid or tender received is sufficient, in the opinion of the board, having regard to the appraisals received by the board and the approval of the Minister.

(7) Subsections (4), (5), and (6), do not apply to any sale, lease, rental or other disposition of real or personal property by the board to another board, a municipal corporation, a community association, a charitable or non-profit organization, the Crown in right of Alberta or any agent of the Crown in the right of Alberta , if the board disposing of the property obtains the approval of the Minister.

This requirement does not apply to evening rentals of the school, or day rentals for a period of 7 days or less, or the lease or rental of board property which is not a school or

which, though formerly a school, has been designated as no longer a school by the School Buildings Board. These exemptions are provided for under Regulation 71/77.

The Minister's power to give or withhold approval is totally discretionary; that is, he is not bound by any statute or regulations to approve of certain types of dispositions or disapprove of others. At present, the Minister's apparent policy is to refuse to approve leases to private schools, and perhaps to certain commercial activities, but to approve of any other disposition requested by a school board. However, such policy, being totally discretionary, is subject to change at any time.

ii) If the Edmonton R.C. Separate School District wishes to "dispose" of any of its property valued at over $1000, it is required to undertake an appraisal, advertisement and tender procedure, unless the "disposition" is to another board, a municipal corporation, a community association, a charitable or non-profit organization, the provincial government or any agency thereof (S. 93 (4) (5) (6) (7) of The School Act). In the future, this constraint will not be relevant to sales, since pursuant to the Parks/School Joint Use Agreement, the board is only allowed to sell its property to the City of Edmonton. The city is, of course, a municipal corporation and is exempt from the procedure for sale set out in Section 93 of The School Act; the procedure for establishing the sale value is set out in the Joint Use Agreement itself. Likewise, the constraint does not apply to lease or rental to public or non-profit bodies, if approved by the Minister of Education. The constraint is relevant where the board wishes to lease or rent to a private or commercial body. Many such bodies do not obtain their space by response to public tenders. The requirements of The School Act for disposition by public tender to such groups could well be viewed by both sides as being administratively burdensome and costly, thus inhibiting the rental of school space to private or commercial bodies.

b) The School Buildings Regulation

i) Although the School Buildings Regulation, Alberta Regulation 180/79 as amended by Alberta Regulation 233/79 and Alberta Regulation 198/80 does not directly limit the nature and type of excess school users, it can have the effect of limiting the school board's perception of acceptable potential users. As previously outlined, the School Buildings Regulation is the regulation which establishes the method of determining the percentage utilization of existing school space in order to determine the amount of funding available from the province to the school board for the construction of new school facilities.

Under the regulation, certain space owned by the board does not have to be counted as part of the fixed capacity of the board; that is, even though this space is not being used by

pupils, it does not affect the measure of how much of its capacity the board is using. Included in this category are

i) a school or part of a school that, with the approval of the Minister of Education, under S, 93 of The School Act, has been turned over to the Minister of Housing and Public Works, converted to another public body, or leased for a specific purpose.

ii) a school or part of a school that with the approval of the School Buildings Board, has been converted to a use other than for the instruction of pupils. The School Buildings Regulation S.3 (2)(e)(f).

The Department of Education interprets "leased for a specific purpose" in its broadest sense. Therefore, any time a district leases a school or part of a school, that property can be exempt from the Provincial Utilization Formula, as long as the requisite approval is obtained under S.93 of The School Act.

In addition, if the School Buildings Board approves the conversion of a school or part of a school to, for example, an administration building, that space can be exempt from the utilization formula.

In all cases, the exemption must be applied for by the school district.

Again, the approval of the Minister under S. 93 of The School Act is discretionary, as is the approval of the School Buildings Board to conversion under the regulations.

ii) If the Edmonton R. C. Separate School District disposes of or leases a school building to which a school building project applies, the School Buildings Board "shall state any reduction of financial support for the school building based upon the life expectancy of the building..." (The School Buildings Regulation, S. (11.4)). That is, any lease or other disposition of a building which has been the subject of a government funded building project, before the expiration of the life of the building, can result in the school board being required to repay a proportionate amount of the government funding, for example, by having it deducted from the next building project allocations.

This section of the regulations is probably no longer relevant to sales or final disposition, since under the Parks/School Joint Agreement, final disposition by the school district can only be to the City of Edmonton.

With respect to leases, the Department of Education interprets the phrase "the School Buildings Board shall state any reduction of financial support" as giving the School Buildings Board the discretion to judge each case on an

individual basis, as to whether repayment is required, and if so, how much. This will depend upon how the School Buildings Board views the lessee and the planned leasehold use. If the use is one that is acceptable, the school board may not receive a reduction of financial support from the School Buildings Board. However, if the user is one that is not acceptable, the school board's financial support may be reduced. Representatives of the Department of Education suggested that leasing to non-profit or other government agencies would not result in a deduction, while leasing to a private entrepreneur would. However, at present, no guidelines exist as to which users will be acceptable and which will not.

iii) Although not a direct constraint to the range of supplementary users, it should be mentioned that if the district's operations and actual utilization are based upon the School Needs Formula, when the Provincial Utilization Formula is applied for the purposes of establishing financial assistance for new schools, the schools will appear to be less utilized than they are from the actual program perspective.

Unfortunately, the situation could arise where a district has rented or leased out all of its effective excess space, and is using every classroom in the school at, perhaps, 50% capacity, yet still would not be considered fully utilized under the Provincial Utilization Formula.

Unless either the basis for determining utilization takes into account the problems of the inability of the district to modify its classroom size to better accommodate its student population and programs, or methods are found for the district to reorganize the delivery of its educational programs or the nature and configuration of classroom space, this discrepancy will continue to be a frustration for both the school district and the School Buildings Board.

c) Parks/School Joint Use Agreement

i) This agreement, which is now in effect, requires the Edmonton R.C. Separate School District to make available to the City of Edmonton Parks and Recreation "such buildings or parts thereof as specified in the Regulations Governing Use of Schools.", (Joint Use Agreement Section 5(a)).

The Regulations Governing Use of Schools are not yet officially in place, but some draft guidelines have been developed. They provide that "Gymnasium facilities shall be the primary areas of schools available under mutually agreed upon arrangements by the respective boards."

ii) The agreement further provides that the school district, at its expense and in consultation with the city, shall be responsible for the development and maintenance of its

building sites, including the ornamental front and side yards which abut the buildings, up to the standards outlined in the Parks/Schools Site Standards (Joint Use Agreement, S.1(A)) shall serve in "an advisory capacity to the Superintendents" of schools in "developing regulations and recommending policies" with regard to the coordination of programs, and the development and use of facilities and sites (Joint Use Agreement, S. 1(B)).

The agreement further provides that any proposed changes in the Parks/School Site Standards or Regulations Governing Use of Schools "will be presented to the Joint Planning Committee for their consideration and recommendations." (Joint Use Agreement, S. 8).

Some questions remain as to the exact process for making and passing these regulations and standards, and whether they would ever be used to encroach upon the plans of the school district for use of its excess space.

iii) Under Schedule A to the Joint Use Agreement, whenever the school board declares real property to be surplus to its needs, it must sell that land to the City of Edmonton. This obligation applies to reserve land owned by the board, to non-reserve land acquired by the board for $1.00 and the cost of local improvements, and to non-reserve land as set forth in Appendix 4 and Appendix 5 to Schedule A, S. 4.3 and 4.4.1. Before the sale to the City can take place, the approval of the Minister of Education under S. 93 of The School Act, must be obtained. (Schedule A, S.4.1 and S.4.8).

Schedule A further provides that
"1.28 - In order to be effective, a declaration by a board that land is surplus to its needs;

1.28.1 - It must be approved by a resolution of the Board, and

1.28.2 - must be given to the city by a notice approved by a resolution of the board."

It should be noted that there is no precise definition of "surplus" in Schedule A - the declaration is made by the school board pursuant to its needs. Thus, while the board's power to sell its property to any party other than the City of Edmonton is limited, there appears to be nothing in the Agreement that would prevent the board from leasing its school facilities that are not used for the instruction of pupils without declaring them surplus.

Neighbourhood acceptability may be a constraint that could limit the scope of supplementary uses of excess space. As illustrated in Table 2.9, which outlines the responses to the questionnaire that we sent to community leagues, uses which are closest to the current use of the school, and are permitted under the Urban Service District, are the ones which would probably be most acceptable to the community. Uses such as offices, housing, retail and commercial, which are neither permitted nor discretionary uses, appear to be the least acceptable to the community. Since the process of re-districting would involve an amendment to the current Land Use Bylaw, residents of the community will have the opportunity to oppose or support the re-districting through the mandatory public hearing process that is part of the amendment process. In addition, all uses whether permitted or discretionary, are subject to appeal by community residents. Since most of the "innovative or newer" supplementary uses for excess school space would, at best be discretionary uses and, at worst, be neither permitted nor discretionary, they would definitely be subject to neighbourhood scrutiny.

TABLE 2.9 : TYPES OF SUPPLEMENTARY USES - NEIGHBOURHOOD ACCEPTANCE

TYPE OF USE / NEIGHBOURH'D ACCEPTANCE	VERY ACCEPTABLE	MARGINALLY ACCEPTABLE	UNCERTAIN	PROBABLY NOT ACCEPTABLE	DEFINITELY NOT ACCEPTABLE
SPECIAL SCHOOLS					
ADULT CLASSES					
PRE-SCHOOL CLASSES					
DAY CARE					
MOTHER'S DAY OUT					
COLLEGES					
SPECIAL CLASSES : THEATRE					
MUSIC					
DANCE					
SPORTS					
CRAFT CENTRES					
MUSIC CENTRES					
THEATRES					
GOVERNMENT ADMINISTRATIVE OFFICES					
HEALTH CLINICS					
HOSPITALS					
AFTER SCHOOL CARE					
SOCIAL SERVICE CENTRES					
CULTURAL CENTRES					
MULTI-SERVICE CENTRES					
HOUSING - PUBLIC : SENIOR CITIZEN					
FAMILY					
HOUSING - PRIVATE : SENIOR CITIZEN					
FAMILY					
MIXED APTS.					
HOUSING - SPECIAL : GROUP HOMES					
NURSING HOMES					
HOSTEL					
CHURCHES					
COMMERCIAL : OFFICES					
STORES					
LIGHT INDUSTRY : PRINTERS ETC.					

D. ECONOMIC CONSTRAINTS

1) COST OF MODIFICATIONS

The cost of modifying school facilities will be dependent upon the scope of the work necessary to accommodate the requirements of the prospective user. The possible types of changes required by each of the potential user types identified, are summarized in Table 2.10.

The actual cost of the various modifications listed will vary with the adaptability and flexibility of the building design and building systems as discussed above in the analysis of physical constraints and development regulations. The costs may only accurately be estimated by analyzing a particular school facility for a specific use.

TABLE 2.10 SOME PROBABLE MODIFICATIONS FOR CONVERSION

PROBABLE MODIFICATIONS / POTENTIAL USERS	GROUP A: Special Schools-Children	Special Adult Schools	Private/Religious Schools	Day Cares	After School Cares	Nursery/Play School	Special Education/Rec'n	Fencing/Cultural Centres	Churches	GROUP B: Prime Offices	Project Offices	Resources/Min. Cit. Centres	Industrial/Commercial	Retail	GROUP C: Senior Citizen Apartments	Senior Citizen Lodges	Family Housing/Apts	Group Homes	REMARKS
demolition																			
REMOVE CEILINGS				●						●		●	●	●	●	●	●	●	
REMOVE WALL FINISHES				●						●		●	●	●	●	●	●	●	
REMOVE PARTITIONS										●		●	●	●	●	●	●	●	
REMOVE CONC. SLAB FOR MECH.	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	DEPENDS ON FLOOR CONST'N
CUT OPENINGS FOR EXTERIOR DOORS & WINDOWS				●											●	●	●	●	DEPENDS UPON WINDOW TYPE
REMOVE DOORS AND WINDOWS				●						●		●	●	●	●	●	●	●	
REMOVE FITTING AND CABINETS										●		●	●	●	●	●	●	●	
construction																			
BACKFILL OVER MECHANICAL	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	IF SLAB ON GRADE
REPAIR CONC. SLAB	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	IF SLAB ON GRADE
BLOCK UP DOORS & WINDOWS															●	●	●	●	DEPENDS UPON WINDOW TYPE
INSTALL FIRE RATED PARTITIONS	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	TO PROVIDE RAT'D SEP'NS
INSTALL FIRE RATING TO EXISTING PARTITIONS				●	●	●		●		●		●	●	●	●	●	●	●	TO PROVIDE RAT'D SEP'NS
INSTALL INTERIOR PARTITIONS	●	●	●	●	●	●	●	●	●		●	●	●		●	●	●	●	AS RAT'D BY PROGRAM
INSTALL NEW EXIT CORRIDORS	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	PRIMARILY FOR PARTIAL CONV'N
INSTALL EXTERIOR DOORS				●										●	●		●		
INSTALL WINDOWS										●				●	●	●	●	●	DEPENDS UPON WINDOW TYPE
INSTALL INTERIOR DOORS				●	●	●	●	●		●		●	●	●	●	●	●	●	
INSTALL FLOORING				●	●	●		●		●		●	●		●	●	●	●	
INSTALL WALL FINISHES				●	●	●		●		●		●	●	●	●	●	●	●	
INSTALL CEILINGS				●						●		●	●	●	●	●	●	●	
PAINTING	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	DEPENDS UPON CONDITION & SCOPE OF NEW WORK
INSTALL FITTINGS & CABINETS				●	●	●		●				●			●	●	●	●	
REPLACE/REPAIR ROOFING																			DEPENDS UPON CONDITION
UPGRADE INSULATION																			DEPENDS UPON ENERGY ANALYSIS
mechanical																			
MODIFY HEATING & VENTILATION SYSTEM	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	TO SUIT NEW LAYOUT
INSTALL AIR CONDITIONING										●									
INSTALL WASHROOM FACILITIES FOR DISABLED	●	●	●	●	●	●	●	●	●	●		●	●	●		●			
INSTALL BATHROOM FACILITIES				●	●	●									●	●	●	●	
INSTALL STANDPIPE SYSTEM	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	DEPENDS UPON BEST'S
INSTALL NEW HEATING SYSTEM															●	●	●	●	FORCED AIR SYSTEMS TO BE AVOIDED
electrical																			
MODIFY LIGHTING & SWITCHING				●	●	●		●		●	●	●	●	●					TO SUIT NEW LAYOUT
INSTALL NEW LIGHTING SYSTEM										●					●	●	●	●	
INSTALL NEW POWER SERVICE										●		●	●	●	●	●	●	●	
INSTALL NEW TELEPHONE SERVICE										●	●	●	●	●	●	●	●	●	
MODIFY INTERCOM	●	●	●	●	●	●	●	●	●										TO SUIT NEW LAYOUT
INSTALL FIRE ALARM	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	DEPENDS UPON EXISTING
sitework.																			
INSTALL PARKING LOT							●	●	●	●	●	●	●	●	●	●	●	●	
INSTALL SIDEWALKS							●	●	●	●	●	●	●	●	●	●	●	●	
INSTALL FENCING				●	●	●									●		●	●	
INSTALL LANDSCAPING				●	●	●									●		●	●	

TABLE 2.11 RELATIVE COSTS OF CONVERSION AS A PERCENTAGE OF NEW CONSTRUCTION

USES	ARCHITECTURAL/ STRUCTURAL (% of architectural/ structural portion of building)	MECHANICAL (% of mechanical portion of building)	ELECTRICAL (% of electrical portion of building)
GROUP A -school, religious facility, day care, child care facilities	4 - 9%	26 - 41%	40%
GROUP B -prime offices, project offices, commercial facilities	17 - 29%	46 - 61%	80%
GROUP C - senior citizens housing, family housing and apartments, group homes	40 - 55%	60 - 86%	100%

*Note: all costs given as a percentage of cost of new construction for the type uses indicated.

The magnitude of cost estimates in Table 2.11 reflects the differences in the scope of work required by each of the groups. The variation in the potential scope of work was identified in Table 2.10. The range of estimated costs reflects the perceived variation in the adaptability and flexibility of the various building components and systems.

To provide an illustration of the cost implications of conversion, Table2.12 is presented as a very preliminary cost analysis. The example provides a preliminary indication of the probable comparative costs of accommodating supplementary uses at current construction costs. A module of 6 classrooms including support spaces was selected to provide a basis for determining costs. Preliminary designs for each case were prepared in order to estimate the scope of the work and to examine the fit of the use to the module.

The limitations cf the cost analysis must be noted.

1) The estimates include only renovations to be accommodated in the module. Support spaces which would probably be housed in the central spaces of the school were not included.

2) The cost implications of modifying the various structural systems, floor systems, and roof systems, were not reviewed.

3) The costs of exterior work, site work, other than parking facilities were not reviewed.

TABLE 2.12 PRELIMINARY ESTIMATED COSTS OF CONVERSION
- estimates in $/m2 ($/ sq. ft.)

	Estimated Cost of Conversion(1) (includes required demoliton and site development costs(2)	Estimated Cost of New Construction
GROUP A - schools - religious facilities - child care	$99.60 to $187.30 ($9.25 to $17.40)	$700.00 to $860.00 ($65.00 to $80.00)
GROUP B (3) - prime offices - project offices - commercial	$270.20 to $461.25 ($25.10 to $42.85)	$540.00 to $645.00 ($50.00 to $$60.00)
GROUP C		
- senior citizen apts.	$548.45 to $613.00 ($50.95 to $56.95)	$473.60 to $516.70 ($44.00 to $48.00)
- family housing and apts.	$468.80 to $525.30 ($43.55 to $48.80)	$430.00 to $540.00 ($40.00 to $50.00)
- group homes	$633.50 to $708.30 ($58.85 to $65.30)	$810.00 to $860.00 ($75.00 to 80.00)

(1) Scope of work does not include structural modifications, fire rating of crawl spaces, nor upgrading of exterior wall assemblies.
(2) Sitework includes only parking facilities as required by Land-Use Bylaw 5996.
(3) Does not include tenant improvements nor upgrading of windows.

Observation of Table 2.12 reveals that the greatest potential cost savings in school conversions may be realized by the types of uses listed in Group A. As the scope of required work to accommodate supplementary uses increases, the potential cost savings decline. E.g. family housing conversion costs would appear to be roughly comparable to new construction costs and senior citizen apartments may even exceed current budgets.

One final caveat needs to be stressed. The information is presented only to provide an indication of the preliminary comparative costs of accommodating supplementary uses at today's costs. Actual costs of conversion of a particular school or portion of a school to a particular use will require comprehensive analysis with the then current market costs. As noted in 'Physical Constraints' each school building may be composed of a variety of construction systems and forms, and have a variety of mechanical and electrical systems. Thus, the actual costs of conversion will be determined by the unique circumstances of a specific school.

2. FINANCING THE MODIFICATIONS

The requirement that the user pay the cost of any modifications to rented school space is a further constraint to a variety of groups. Several types of users do not have the capital available for modifications. Non-profit and community based user groups in particular may not have capital funding available, although they may be able to pay for the cost of modifications over time as part of their ongoing expenditures for space. In addition, such groups often may not qualify for loans from regular lending institutions such as banks, credit unions or trust companies. While they may be eligible for private or public grant funding, such funding may not always be available, or not immediately available, and may not be adequate to cover the cost of modifications. Another source of capital funds for such groups is public or community donations. If it is not possible for such groups to raise capital funds or if the funds so raised are inadequate to cover the cost of renovations, such groups might find themselves in a position of either not being able to undertake the required modifications or having to abandon the possibility of using school space.

The requirement that the user pay for the cost of modifications has implications for the length of lease term. For example, using the low estimate of $25.10/sq. ft. for category B users, which is exclusive of tenant improvements, it is highly unlikely that a user would agree to a term of less than three years, since amortized over three years, the cost to the user for the space, including the $3.75/sq. ft. currently charged by the board, would be $12.12/sq. ft. exclusive of taxes, insurance and the cost of tenant improvements.

E. REQUIREMENTS FOR RECONVERSION

It is difficult to estimate the scope of required modifications and the cost of re-converting a converted facility for use by the Edmonton Separate School Board. Similarly, it is difficult to establish the requirements for restrictions to be imposed upon conversions in order to facilitate the reconversion of a facility. The requirements for and the costs of re-conversion will be established by the original modifications to convert a facility for supplementary use and by the prevailing educational concepts and program requirements at the time the facility will be required by the board.

The scope of the required physical modifications and changes to development regulations to accommodate a supplementary use tend to be interdependent. The greater the magnitude of the physical changes, the greater the probability that it will be necessary to amend the existing land use classification. Both the scale of the changes to physical structure and development regulations affect the length of tenure required by the supplementary use. As indicated in the user requirements outlined in Chapter Three, the length of tenure required by a supplementary use tends to increase as the scale of changes increases. The method of financing improvements and of recovering the costs of the improvements also determines the requirements for length of tenure. As the length of alienation of the space from the Edmonton Separate School District increases, so will the uncertainty as to future educational concepts and program requirements. The decision by the District to lease a particular school for an extended period, for example for greater than 10 years, should be based upon enrollment predictions that the school will not be required by the district for that period. Such a prediction implies a low probability that the facility will be required by the district after the termination of the lease period; therefore, requirements for reconversion need not be a constraint upon the original conversion.

Also, for facilities that are to be alienated for a period such that a wood frame structure may be 35 years old or a masonry sructure may be 50 years old at the end of the lease period, there is an increased probability that the physical condition of the structure and building systems makes the building obsolete, in addition to the building being obsolete for educational purposes.

The requirements for reconversion may then only be appropriate for short term leases (less than 10 years), especially for those schools for which it is predicted that the district will require the space during or at the termination of that period.

CHAPTER THREE

: CASE STUDY
- A STRATEGY FOR THE MANAGEMENT OF EXCESS SCHOOL SPACE

CHAPTER THREE

: CASE STUDY - A STRATEGY FOR THE MANAGEMENT OF EXCESS SCHOOL SPACE

1. PLANNING FOR EXCESS SPACE

A. DIRECTION BY DESIGN

As outlined in Chapter Two, a primary constraint to the use of excess school space for a variety of supplementary users is that much of the available excess school space is in groupings of 6 or less classrooms. This excess space is currently located in the inner core, in the centre of the inner suburban neighbourhoods and the west outer suburban areas. It is estimated that over the next five years, the greatest increase in excess space will probably occur in the inner suburbs.

There are at least two management options open to the school district in planning for its excess space.

First, it could allow enrollments to take their natural course and expand the scope of supplementary users as more space becomes available. Second, it could direct the timing and availability of excess space.

Option 1: No Intervention

The school board could decide to adopt a strict no-intervention policy, thus allowing settlement patterns in the city and fertility rates to determine where excess space would arise. Such a policy would not ensure that the space most suitable for education would be used for education; it would not ensure that the space most economical and efficient to operate would remain in operation; it would not ensure that space suitable to uses other than education would become available for those uses; nor would it ensure that space which was available for other supplementary alternate uses one year would necessarily be available the next; it would ensure that excess school space would become available in a relatively unpredictable random fashion, and that decisions about disposition would be made on an ad hoc basis.

Option 2: Intervention

The second option involves directing the availability of excess space by analyzing enrollment trends, the inventory of space available, the suitability, flexibility and adaptability of that

space, and directing use in such a way as to ensure the optimum use of all available space. Such an approach would increase the opportunity for a broad range of supplementary uses. In addition, it is more likely to ensure that the most suitable facilities are available for educational purposes. It is our belief that strategies based on intervention will much better achieve the goals of the Edmonton Separate School District.

Option 2: A-Direction by Decree

Within the intervention option, there are two possibilities, intervention by centralized decision or by decentralized process. Intervention or direction by decree has been found, in other jurisdictions, to be a solution fraught with anger, citizen-board confrontation, frustration, and misunderstanding. The impact of the change of use in a school affects students, teachers, parents, neighbours, and ultimately, entire systems. Where that change is directed without real involvement by those affected, it tends to be viewed as arbitrary, unmotivated, and sometimes, hostile. A few quotations from other jurisdictions should demonstrate the problem:

> *It is up to the school board to take the initiative in 'infiltration' of these organizations (community organizations, Chamber of Commerce, etc.) and in leading others to understand the role schools play in revitalizing an area. Without this important interchange and collaboration, many school district efforts will be thwarted at the onset (for lack of funding and community support).*
> *(National School Boards Association, Declining Enrollment: Its Challenge for Urban School Boards, 1978)*

> *The taxpayers of Ritenour School District, a conservative community near St. Louis, Missouri, chose to keep the status quo when their board of education recommended reorganizing the grade systems.*
> *(EFL, Surplus School Space: Options and Opportunities, 1978, 46)*

> *As one board member described the process, "We went sailing in naively, adding up kids and square footage. It was a debacle." When the closure list was made public, various neighbourhood groups were quickly able to demonstrate the inadequacy of the data on which the recommendations were based.*
> *(Weatherly, R. et al., School Closures in Seattle: The Politics and Management of Decline, 1981, 6)*

Option 2: B-Direction by Design

We have labelled the second intervention option, 'Direction by Design' because it involves a process of involving all those affected in designing and implementing their own specific plans for the space in their own particular schools. Jurisdictions which report ability to deal with excess school space and the various problems and opportunities which such excess space creates invariably report some method of citizen involvement. Involvement has tended, first, to lessen the impact of changes on the various groups, students, parents, teachers, neighbours, etc. who are affected; second, because of the diversity of the information and perspectives brought to bear on the issues, involvement has tended to increase the flexibility of the systems and the creativity of the solutions developed. The National School Board Association report states

> *Citizen participation must not be based on "token" or trivial involvement. A good many school districts are learning that genuine community participation in planning facilities and programs equals increased understanding, empathy for education problems/concerns and, most important, a sense of ownership of the community's public school system. It can only lead to a more positive portrayal of the school district.*
> *(NBSA, 7)*

There are examples of efficient successful programs operating through schools all over North America which have been developed and implemented by citizen involvement. A typical example of citizen direction of use of space is the practice of the City of Toronto:

> *The overall scheme is called Parallel Use, which means that a group can have exclusive occupancy of vacant educational space between 8:00 A.M. and 10:30 P.M., Monday through Friday. The decision on whether space is vacant and who can use it for each school is made by a Parallel Use Committee (PUC) of school staff, parents, residents, and local businesses and agencies. A PUC is established if a school has under 700 pupils and more than three empty classrooms, or if it has more than 700 pupils and over five empty rooms.*
> *(EFL, Surplus School Space: Options and Opportunities, 46)*

This is only one of many styles of involvement which have emerged. A report from Seattle describes some others:

In addition to facility planning, citizens played critical roles in desegregation, school finance, and long-range educational planning. Involvement takes many forms, ranging from the ad hoc group that organizes around a specific issue to broader-based, ongoing groups that tend to work in a collaborative way with school officials. A third kind of group that has emerged using the approaches of the other two is the informal coalition of citizen leaders who bring their citywide constituencies together around a particular issue.
(Weatherly, R. et al., School Closures in Seattle: The Politics and Management of Decline, 24)

In summary then, it is the strong recommendation of this study that the E.S.S.B. five year plan be developed through a 'Direction by Design' process involving maximum citizen participation in both planning and implementation of the plan. The following plan outlines such a process.

II. THE FIRST STEP: ESTABLISHING GOALS, OBJECTIVES AND PRINCIPLES

The first essential step in any planning process is to establish the overall framework of goals and objectives within which the process will operate. The following material proposes a number of goals and objectives for the use of school space and principles for the disposition and use of excess school space.

Section A proposes working definitions for education, school facilities and excess school space. Without such common definitions, it would be impossible to proceed to consider any detailed goals, objectives or principles.

Sections B and C present some general goals and objectives for the use of all school space. They reflect the prime concern of any school system, that is, its ability to serve the educational needs of its students. The goals and objectives also suggest some directions which a school board might take once its primary task of education has been suitably provided for.

With Section D, we move to a more detailed consideration of the use of excess school space. Again, the primary objective is related to the education of K - 12 students.

Section E proposes some basic principles to guide planning for the use of excess space, methods to be used for determining the use of excess space, principles regarding the acceptability of users of excess school space, and the nature of the school board's accountability for the disposition and use of excess school space. It attempts to present a series of principles which may be used throughout the entire process of design and implementation of the five year plan for the use of excess school space.

A. DEFINITIONS

In order to develop goals and objectives for the use of school space, and principles for the disposition and use of excess school space, it is necessary to begin by defining the following terms:

Education is a process designed to provide tools, information, skills and methods which enable the learner to know/learn about self and universe on both a practical and a philosophical/spiritual level.

Students include

a) students over whom the E.S.S.B. has legal jurisdiction, in particular students in grades K - 12*, and special programs such as, but not limited to programs such as Adaptation Classes, Educable Mentally Handicapped and Trainable Mentally Handicapped programs.

b) students for whom the E.S.S.B. has assumed a program responsibility. This category includes but is not limited to students in programs such as Continuing Education programs.

c) students for whom the E.S.S.B. facilitates programs by contracting with private teachers or other agencies, to provide particular types of education.

School Facilities include

- all school buildings, including portables that are considered by the school board to be in a condition suitable for educational or other use regardless of age or construction.

- all land upon which a school facility or portion thereof is situated.

Potential Excess Space: any space within an existing school building or portion thereof which is not required for the appropriate delivery of K - 12 educational programs. It shall be considered excess school space available for alternate uses.

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* Note 'K - 12' is used throughout this paper to refer to Early Childhood Services, regular grade 1 to grade 12 and all special programs run under the legal jurisdiction of the E.S.S.B.

B. GOALS FOR THE USE OF SCHOOL SPACE

School space shall be used

1. to enable the education of K - 12 students.

2. to enable provision of educational opportunity to a broad range of the community beyond the K - 12 system.

3. to enable the broadening of the range of education programs and activities both within and beyond the K - 12 system.

4. to ensure the long-term integrity of the Edmonton Separate School System.

5. to provide a physical resource to

   a) students/teachers
   b) the parent/ratepayer community
   c) the adjacent neighbourhood
   d) the city as a whole

C. OBJECTIVES FOR THE USE OF SCHOOL SPACE

School space shall be used to ensure

1. that education of students takes place in those facilities most educationally suitable to the particular task.

2. that space which is less educationally suitable for students or which has less possibility of being improved to an appropriate level of suitability be used for the maximum benefit of

   a) the parent/ratepayer community;

   b) the adjacent neighbourhood;

   c) the city as a whole.

3. maximum accessibility for

   a) students/teachers

   b) parent/ratepayer communities

   c) adjacent communities

   d) city as a whole

4. that the maximum range of educational opportunities is available to

   a) K - 12 students

   b) other members of the community

5. that current and future uses do not jeopardize possible future educational opportunities - particularly K - 12.

D. OBJECTIVES FOR THE USE OF EXCESS SCHOOL SPACE

Excess school space shall be used in such a way as to ensure the maximum educational benefit to publicly funded K - 12 education, to students for whom E.S.S.B. has assumed a program responsibility, to students whose programs are facilitated by contract, to parents of students, to the neighbourhoods adjacent to the schools, and to the community as a whole.

E. POLICY PRINCIPLES TO GUIDE THE DISPOSITION/USE OF EXCESS SCHOOL SPACE

Principles for planning the disposition/use of excess school space:

1. The configuration of excess school space should be actively planned and directed by the school district.

2. Educational suitability or potential for increased suitability shall be the first concern in planning the disposition of excess school space.

3. Planning for excess school space should be done in concert with students, teachers, parents, ratepayers, adjacent neighbourhoods, and community users and potential users of school space.

Methods to be used in determining the disposition/use of excess school space:

1. Determination of excess school space and potential excess school space shall be done on the basis of the School Needs Formula outlined in Ways of Using Excess School Space.

2. Determination of optimum disposition/use of excess school space shall be made on a planning area basis, with planning areas determined by the school board and the consultants during development of the 5 year plan.

3. In an effort to make excess school space as accessible as possible to the broadest range of acceptable users, the school district with potential users shall attempt to remove barriers to types of acceptable use in general and to particular acceptable users.

Acceptability of users of excess school space:

1. Agencies and groups wishing to use excess space within the E.S.S.B. must be compatible with the philosophy of the E.S.S.B.

2. Potential users shall be ranked in order of their acceptability as users of excess school space in terms of the benefits they provide to the affected communities. Of first priority will be those users who provide benefit to K - 12 students/teachers, second priority to those who provide benefits to other potential students, third priority, benefits to the adjacent community, fourth priority, benefits to the community as a whole, fifth priority, benefit to ratepayers.

3. Excess school space should be used in ways which are acceptable to the other groups affected by that use.

4. Excess school space in schools which are partially used for K - 12 classes shall be used in ways which are acceptable to school administrators, students and teachers, and secondarily in ways which are acceptable to parents and the adjacent community.

5. Excess school space in schools which are not also used for K - 12 education, and other system operated programs, shall be used in ways which are acceptable to the adjacent community.

6. The school district and the user of excess school space shall jointly be responsible for minimizing any negative effects (e.g. increased traffic, parking, etc.) of the proposed use on the adjacent communities.

7. Through flexible leasing, marketing, and economic policies, the school district shall encourage as broad a range of users of excess school space as is possible and acceptable.

Accountability of school district for disposition/use of excess school space:

1. The school district's first responsibility is to ensure that its disposition and use of excess school space ensures the continued existence of maximum educational opportunity both for K - 12 students and for students of other system operated programs within the Edmonton Separate School System.

III ORGANIZING THE PLANNING PROCESS

The second step in developing a 'Direction by Design' process for guiding the disposition of excess space involves establishing an administrative or organizational structure within which citizens may work. Such a structure requires, first, a division of the whole school district into smaller, workable planning areas, and second, the creation of task groups within each planning area and the assigning of responsibilities in order that citizens, educators, and School Board members may work together in a collaborative and efficient fashion to carry out the tasks necessary for the planning process.

A. IDENTIFICATION AND ESTABLISHMENT OF PLANNING AREAS

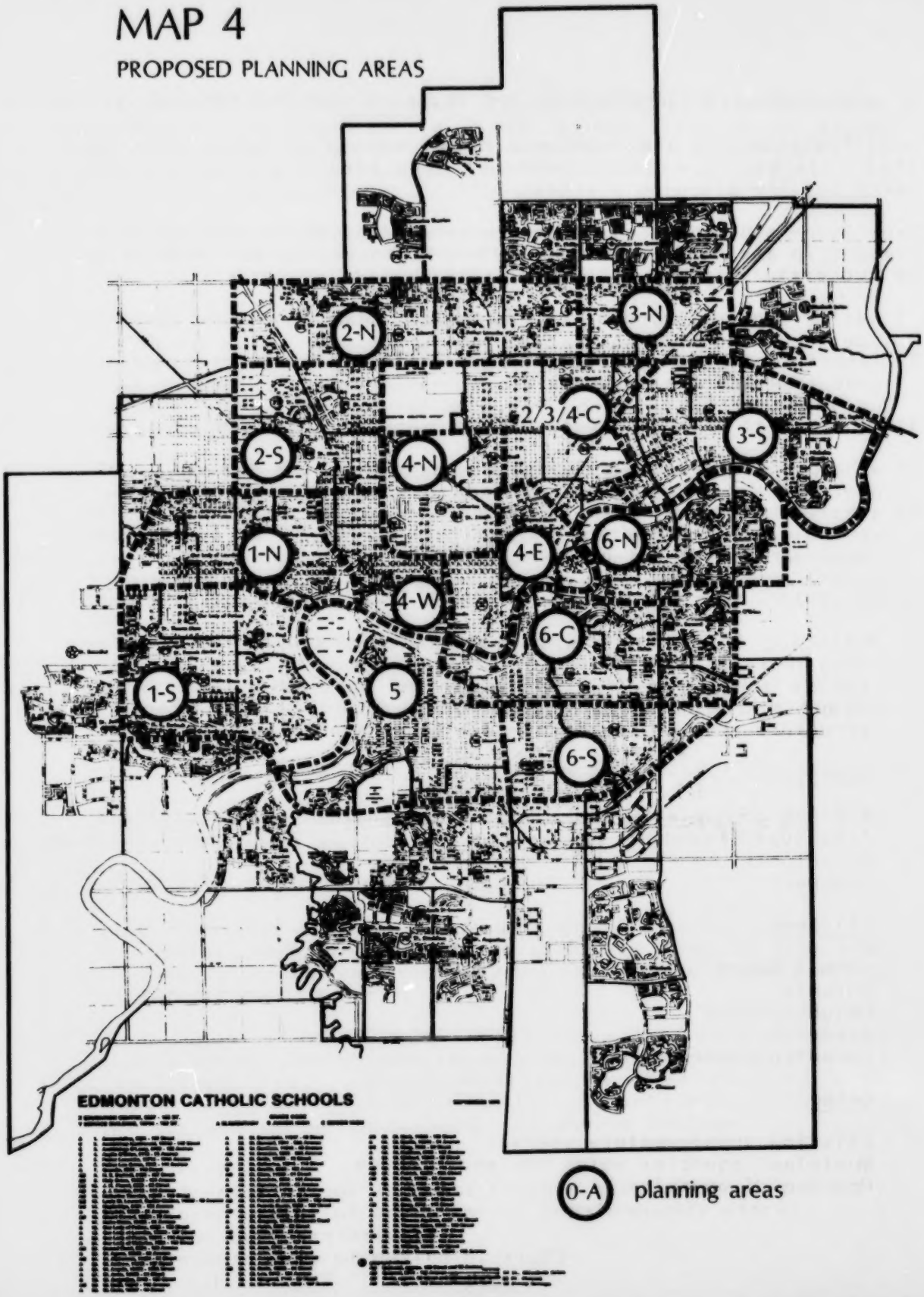
In order to establish planning areas, the parts of the City currently experiencing a decline in enrollments (Inner Core, Inner Suburban and West Outer Suburban Communities) were divided into regions. Three boundary options were reviewed: the current E.S.S.B. area boundaries; the Parks and Recreation District boundaries, the Human Service Delivery Boundaries, and the Ward and District Plan boundaries. The E.S.S.B. area boundaries, which divided the city into three areas, were determined to be too large as were the Parks and Recreation District boundaries. There was a degree of similarity between the Human Service Delivery Systems and the Ward and District Plan Boundaries, each providing 6 main planning areas. The Ward and District Plan boundaries were selected as the basis for the Planning Areas, because of the probability that the area based information required for the planning process will be available.

Within each of these planning areas, sub-areas were established. A number of factors were taken into consideration when establishing these sub-areas. Natural boundaries, such as major arterials, the river and ravine system, were reviewed. Current E.S.S.B. catchment areas for the various schools were also taken into account. It was felt that the planning sub-area should be such that local residents could easily relate to the boundaries, thereby encouraging neighbourhood participation. In order to establish these sub-areas, it was necessary to modify the main area boundaries established. Finally, it was considered important that the E.S.S.B. should be able to obtain demographic data for the sub-areas. Discussions with a representative of the City of Edmonton Planning Department responsible for the PRISM Data files, revealed that data will continue to be available from PRISM on a neighbourhood basis. This flexibility will allow the District to obtain such information if necessary, on an even smaller unit than the planning sub-area, if this is required.

The following map outlines the proposed boundaries for the planning areas/sub-areas. It is suggested that during the first year of implementation of the plan, that these boundaries may be reviewed and refined.

MAP 4

PROPOSED PLANNING AREAS



B. ADMINISTRATIVE STRUCTURE OF THE PLANNING AND IMPLEMENTATION PROCESS

Once the planning areas and sub-areas are established, the next step will be the establishment of area planning structures to carry out the planning process.

Experience suggests that there are several elements which must be present in the basic planning structure to enable the process to be successful:

1) all groups affected by excess school space should be involved;

2) there must be clearly stated goals, objectives, jurisdictions and tasks for the process;

3) there must be a good data base available to all parties;

4) the process must be allotted a reasonable time frame;

5) there must be a variety of process options available to fit the different situations which are likely to be encountered during the over-all planning and implementation process.

1. ALL GROUPS AFFECTED BY EXCESS SCHOOL SPACE SHOULD BE INVOLVED:

Existing interest/information groups: Within each planning area there will be groups of people with particular interests in the schools and neighbourhood and particular information about those schools and neighbourhoods. The planning structure should incorporate all these groups.

<u>Educators</u>

E.S.S.B. administration - including program area specialists
Area Superintendents
Principals
Teachers

<u>Citizens</u>

School Board
Parents
Neighbourhood
Students
Potential Users

<u>Other</u>

Existing supplementary users
Municipal agencies which may share space
Provincial agencies

Task Groups: for an efficient participatory planning and implementation process to take place, these existing interest/information groups must be formed into functional task groups within the established planning areas. We suggest the following arrangements.

a) In any participation structure dealing with the disposition of excess school space, the E.S.S.B. must play the leading role as the responsible decision making body.

b) To coordinate the activities of all groups involved in the planning and implementation process, there must be one responsible administrator in central office. We suggest that this co-ordination function be performed by a 'Supplementary Use Officer'. This would be a new administrative function within the E.S.S.B. administration.

c) Each planning sub-area identified as having current or imminent excess space problems will require an Area Planning Team. Since this team will be responsible for assessing the present use of space, and for directing future use, it is essential that it be representative of the major interest/information groups affected in the area. It should include

- the principal of each school in the area;
- the chairperson or delegate from the Home and School Association or other similar school based parents group for each school;
- a representative of the teachers of each school;
- a representative of each local Community League in the area or other major neighbourhood group;
- the Area Superintendent.

Since planning sub-areas generally contain approximately 1 - 7 schools, the planning teams would likely range in size from 10 - 30, plus the Supplementary Use Officer, who would sit on all Area Planning Teams.

d) Each school which is identified in an Area Plan as having excess space, should have its own Neighbourhood Supplementary Use Committee. This Committee will be charged with implementation tasks relating to its particular school and the surrounding neighbourhood. It should include

- the Principal
- representatives of teachers/parents/neighbourhood groups;
- representatives of any existing supplementary users;
- student representatives;
- representatives of custodial staff.

Again, the Supplementary Use Officer, and the Area Superintendent will be ex officio members of the Neighbourhood Supplementary Use Committee.

e) Representatives from the E.S.S.B. central office administration, especially program specialists, plus specialists from municipal and provincial agencies (e.g. Municipal Parks and Recreation, Provincial Department of Education, etc.) will act as resources to all of these task groups, through the Supplementary Use Officer.

2. THERE MUST BE CLEARLY STATED GOALS, OBJECTIVES, JURISDICTIONS AND TASKS

a) E.S.S.B.

The goals, objectives and principles of the Edmonton Separate School Board, in respect to the use of school space and the disposition of excess school space have been established above.(Section II) These goals, objectives, and principles will guide the entire process of planning the disposition of school space, and implementation of the plan.

Jurisdiction - the E.S.S.B. is the body responsible for all policy decisions within the Edmonton Separate District. It is responsible for decisions which affect the district as a whole, for negotiations with anyone outside the system for modifications to the policy, and for approval of all plans developed for planning sub-areas and individual schools.

b) Supplementary Use Officer

The function of the Supplementary Use Officer is to carry out the goals, objectives, principles, and policies of the E.S.S.B. in respect to planning and implementation.

Tasks:

- to establish Area Planning Teams;
- to establish Neighbourhood Supplementary Use Committees;
- to coordinate the collection and dissemination of data for the teams and committees;
- to coordinate preparation of school area plans;
- to coordinate school supplementary use plans;

- to prepare marketing procedures;

- to market excess school space according to school supplementary use plans;

- to coordinate review and on-going evaluation of planning/implementation process;

- to prepare materials on behalf of Board with regard to by-law modifications, etc.

c) Area Planning Teams

Goal: the optimum use of space for educational programs and supplementary uses within the school space available in the planning area.

Objectives: the preparation of an area plan to direct the disposition and use of all school space within the area.

Tasks:

- to assess the effect of enrollment changes on area schools
- to define desired programs;
- to identify facilities for educational programs;
- to analyze facilities in light of desired programs and inventory of facilities and program space requirements;
- to prepare area plan;
- to provide information to the community throughout planning process;
- to monitor area enrollment patterns, needs and requirements on a yearly basis, and to modify the area plan as required.

d) Neighbourhood Supplementary Use Committee

Goals: to plan for the optimum use of school space within a particular school in light of the Area Plan, particular school programs, space configuration, and neighbourhood requirements.

Objectives: to prepare a school space use plan to guide the choice of supplementary users for the excess space within the school.

Tasks:

- to analyze flexibility and adaptability of spaces within their school from data provided by Supplementary Use Officer;
- to analyze neighbourhood needs and requirements;
- to prepare, within guidelines of the Area Plan, a school space use plan;
- to prepare, within Board guidelines, criteria for the acceptance of supplementary users within the particular school;
- to provide these criteria to the Supplementary Use Officer for purposes of target marketing.
- to provide information to the neighbourhood throughout the planning and implementation process;
- to monitor neighbourhood enrollment patterns, needs, and requirements and provide such information to the Area Planning Teams on a yearly basis;
- to monitor uses within the school, and changes in neighbourhood needs and requirements, in order to modify the school space use plan as required.

3. THERE MUST BE A GOOD DATA BASE AVAILABLE TO ALL PARTIES:

There are several distinct types of information which will be necessary in order to make the necessary planning and implementation decisions. In particular, the Area Planning Teams will require information about enrollment patterns, school programs, school facilities and program space requirements, potential supplementary uses and their space requirements, School Board policy, and any provincial or municipal requirements which may affect possible uses.

The Neighbourhood Supplementary Use Committees will require information about the adaptability and flexibility of particular school spaces, potential supplementary uses and the space requirements they have, and constraints to supplementary uses, including land use controls, building code requirements for particular uses, costs and extent of modifications required for different uses, and so on.

See Section IV for details of data collection and organization.

4. THERE MUST BE A REASONABLE TIME FRAME FOR THE PROCESS:

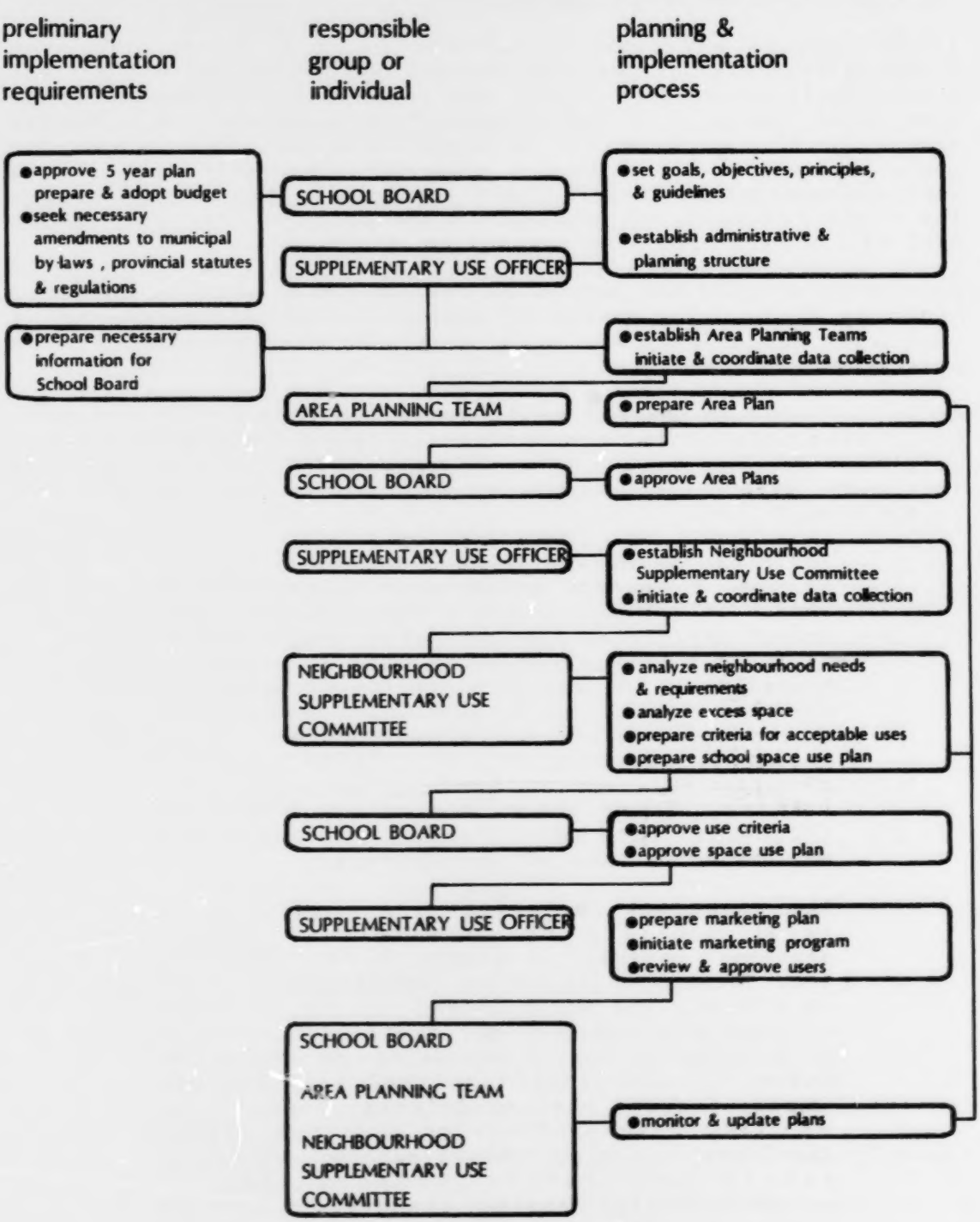
For any process to be successful, adequate time must be budgeted for it.

5. THERE MUST BE A VARIETY OF PROCESS OPTIONS AVAILABLE TO FIT DIFFERENT SITUATIONS:

The needs of a particular planning area or neighbourhood, the information available, the degree of change being experienced in enrollment and settlement patterns, the commitments of energy and time available to the various planning and implementation groups are all factors which will affect the particular process each group arrives at for completing its tasks. The following is a brief review of common process options and the possible use of each. It is divided into two major types of processes - intensive and extensive. We define an intensive process as one in which specific detailed questions are raised which must be answered with specific detailed plans within a specific time period. The extensive process options, on the other hand, involve situations in which the issues are not so well defined, the time period not so crucial, the possibility of arriving at definite answers limited, or the task ongoing. For a review of various extensive and intensive process options, see Appendix III.

CHART 1

PROPOSED PLANNING STRUCTURE AND PROCESS


preliminary implementation requirements
responsible group or individual
planning & implementation process
●approve 5 year plan prepare & adopt budget
●seek necessary amendments to municipal by-laws , provincial statutes & regulations
SCHOOL BOARD
●set goals, objectives, principles, & guidelines
●establish administrative & planning structure
SUPPLEMENTARY USE OFFICER
●prepare necessary information for School Board
●establish Area Planning Teams initiate & coordinate data collection
AREA PLANNING TEAM
●prepare Area Plan
SCHOOL BOARD
●approve Area Plans
SUPPLEMENTARY USE OFFICER
●establish Neighbourhood Supplementary Use Committee
●initiate & coordinate data collection
NEIGHBOURHOOD SUPPLEMENTARY USE COMMITTEE
●analyze neighbourhood needs & requirements
●analyze excess space
●prepare criteria for acceptable uses
●prepare school space use plan
SCHOOL BOARD
●approve use criteria
●approve space use plan
SUPPLEMENTARY USE OFFICER
●prepare marketing plan
●initiate marketing program
●review & approve users
SCHOOL BOARD
AREA PLANNING TEAM
NEIGHBOURHOOD SUPPLEMENTARY USE COMMITTEE
●monitor & update plans

IV. COLLECTING AND ANALYZING DATA

In projecting enrollments for the planning area, the Area Planning Team should take into account the historical and current enrollments, retention rates, and potential enrollments based upon Civic Census Data and neighbourhood analyses. A procedure for projecting enrollments is proposed below. For each of the sub-areas, a specific method is proposed in Appendix III. First Year Implementation Phase. The Area Planning Team should review the suggested approach and modify the approach as required as part of the first year implementation.

Enrollment projections should be reviewed each year by the Area Planning Teams. The extent of such a review will be dependent upon what has happened to enrollments in each sub-area in the past year.

As illustrated in the following quotation from the Educational Facilities Laboratory, any analysis of school enrollments on a neighbourhood basis must take into account a number of factors that might affect the increase or decline of school age children in the area.

> *The broad movements between and among regions provide a general background of population change--or as sociologists say the macroview. School districts, however, also need a microview, a means of keeping tabs on what is happening in the way of migration on their own precise turf. Here, unfortunately, the demographers are of little help. They recognize the need and significance of the problem but the methods of analysis are limited. There are of course any number of indicators but, for many of these, data are not available on a sustained basis.*
>
> *The essential ingredient for a picture of local mobility is an accurately taken preschool census. It simply is not enough to know the number of births and the first grade enrollments six years later. If the movement of people is substantial, a six-year blackout of information can be explosive--or implosive. Other indicators of local mobility include impact factors such as defense industries, military base openings or closings, tract developments, urban renewal actions, shifts in ethnic and racial composition of neighbourhoods, zoning changes permitting change in use, sewage developments (see "A Saga of Sewers" for a dramatic story of Fairfax County, Va.), housing starts, apartment developments. The list is long and the elements selected depend on local*

availability of data and the ingenuity and alertness of the local planning agency or school system.

(EFL: 1974 p. 25)

With this in mind, the following questions should be taken into consideration when reviewing the potential enrollments on a school by school basis, within a planning sub-area.

1. PATTERNS OF SCHOOL ENROLLMENTS FOR THE LAST FIVE YEARS

- has the overall enrollment decreased?
- what has been the grade by grade retention rate?
- what is the overall enrollment of the school compared to its capacity?
- have the public school enrollments been similar to those of the separate school over the last five years?
- based upon current population data what are the projected enrollments for the next five years?

2. NEIGHBOURHOOD ANALYSIS FACTORS THAT MIGHT AFFECT ENROLLMENTS

- what are the characteristics of the population of the feeder neighbourhoods?
- is there a high proportion of households whose children are now either mid-way or partially through the school system?
- is there a high proportion of senior citizens?
- is there a high proportion of single person households in the neighbourhood?
- is there a high proportion of people between the ages of 20-30 in the neighbourhood?
- how many children are there and what is the distribution of children per household?
- has there been any significant change in the demographic characteristics of the neighbourhood in the last year?.

-physical characteristics of the area

- what is the nature of the housing stock in the area?
  . types of structures?
  . age of structures?
  . what type of development has occurred in the past 10 years?
  . whatis the potential for development and redevelopment in the area?
  . is there any vacant land? (given current land use controls what type of development could be built on the vacant land?)
  . is there potential for redevelopment? (what type of redevelopment could occur?)

- are there any major developments that might affect the nature of the community?

  . is there a community plan being prepared?
  . is there any industrial, commercial, recreational, or transportation development that might affect the neighbourhood?

- household tenure

  . what is the tenure distribution?
  . what type of housing is occupied by owners?
  . what type of housing is occupied by renters?
  . in what type of housing do children age 0-15 reside?

- household mobility

  . what percentage of the residents resided in the community in the previous year?
  . what percentage of owners resided in the community in the previous year?
  . what percentage of renters resided in the community in the previous year?

- accessibility of homeownership in the neighbourhood based upon income by house sales

  . number and nature of residential sales in area?
  . average sales price, and the distribution of the sales?
  . what income would a family require to purchase a home in the community?

B. GATHERING THE DATA FOR ENROLLMENT ESTIMATES

1. PATTERNS OF SCHOOL ENROLLMENTS

Because both Edmonton School Districts maintain grade by grade enrollments, the base information for determining patterns of school enrollments for the past five years, as well as for future years, should be readily available. For the schools within the planning sub-areas, the historical enrollment data can be used to establish overall change in enrollments as well as the grade retention rates.

Since school capacities are calculated each year by the ESSB on both the School Needs Formula and the Provincial Utilization Formula, these data should be available to the Area Planning Team. General demographic data such as the number of people and age distribution, as well as the number and distribution of 0 - 6 year olds of both Catholic and non-Catholic families may be obtained from the Civic Census Data. This information which is currently available from the City of Edmonton, at no charge, is updated on an annual basis.

2. NEIGHBOURHOOD ANALYSIS FACTORS THAT MIGHT AFFECT ENROLLMENT

It is suggested that what is required for estimating enrollments is not a vast amount of quantifiable data, but rather, base information that will provide the Area Planning Team with an understanding of potential changes in the enrollments in the future. Since the Area Planning Team will have community and school representatives from all the neighbourhoods within the area, it should be possible for the Area Planning Team to provide the base information to identify the factors that might affect enrollments. It might be possible, because of the complexity of the area, or because of rapid changes in the area, that the members of the Area Planning Team are unable to identify or isolate factors that might affect enrollments from their own data base and knowledge. In this instance, there might be a need to obtain a PRISM Data file for either a whole planning sub-area, or one neighbourhood within the sub-area. The PRISM Data should be able to provide the Planning Team with the information outlined as possibly affecting enrollments, since it combines Civic Census Data; providing information on the population characteristics of the neighbourhood, including age distribution, tenure, mobility, household size, type, etc. and Assessment data, providing information on housing, land use, potential for redevelopment, and sales data; all of which can be merged and correlated. The obtaining of such information from PRISM should not be difficult since the program and data files developed during Stage I of this study, will be maintained by the City of Edmonton Planning Department. The existing program could be used as is, or modified as required for the neighbourhoods on which PRISM data files exist. It could also be used to develop new files for areas for which no PRISM data files exist.

There is a charge for the information from the PRISM files which can be obtained from the City Planning Department on a task basis.

C. FACILITY ANALYSIS

Once the enrollment data have been collected and interpreted, the Area Planning Team should be able to determine the potential for excess space within its area. The next task for the Area Planning Team, then, is to analyze all the school facilities within its area to enable the Team to establish which space should be used for which purposes.

In the report Ways of Using Excess School Space - Stage I, May 30, 1981 it was pointed out that a necessary part of planning for the use of excess school space was the determination of the suitability of any facility to provide the required educational programs:

> *EDUCATIONAL ADEQUACY/SUITABILITY OF THE FACILITY*
>
> *This refers to the ability of a facility to meet the needs and requirements of the educational programs offered now and in the future, and the projected major physical replacement required to the building.*

Such an assessment of educational suitability is necessary to ensure that the space most suitable for educational purposes will be used for education, and that space less suitable for education will be identified and allocated for other programs.

In other words, a two stage analysis of facilities is proposed. The first stage is intended to identify the facilities required for educational programs and to identify excess space. The second stage is intended to provide a process for determining how the excess space is to be used.

1. IDENTIFICATION OF FACILITIES REQUIRED FOR EDUCATIONAL PROGRAMS

To identify the facilities to be selected for educational programs, it is proposed that the Area Planning Team, with technical assistance from central office personnel, initiate a planning process which would include the following steps:

a) Define the Programs to be Offered in the Planning Area.

- identify the required programs;
- identify the core subjects of the programs to be offered in a school;

- identify the programs which should be available in the planning area but not necessarily in a "home" school.

b) Establish the Space Requirements of the Programs (See Grid 1)

- identify the required instructional and non-instructional spaces;

- identify the types of spaces required for the core subjects of a program in a school;

- identify the space requirements for programs to serve the entire planning area.

c) Analyze the Facilities in the Planning Area (See Grid 2 & 3)

- complete an inventory of the school facilities in the planning area to identify the types of spaces available in each school;

- compare the inventory of facilities to the types of spaces required for the core subjects of a program to be accommodated within a school and for the programs which will serve the entire planning area.

  If there is a choice of schools or parts of schools available which could accommodate the programs, a detailed space assessment of the spaces within each school should be prepared.

  The suitability of instructional and non-instructional spaces within the school should be assessed in terms of the requirements of each of the spaces as defined in Appendix III. (The space requirements as presented in Appendix III represent a preliminary definition of the requirements of the instructional and non-instructional spaces within school facilities. It is proposed that the requirements will be reviewed and refined duing the First Year Implementation Phase.)

EDMONTON (R.C.) SEPARATE SCHOOL DISTRICT #7

● educational suitability assessment : PHYSICAL REQUIREMENTS

REQUIREMENTS of

SPACE

date prepared:

date revised:

capacity

area

notes

space characteristics		NOTES
LIGHTING	natural	
	artificial	
VIEW OUT		
ACOUSTICAL PRIVACY		
SERVICES	water	
	electricity	
	gas	
	ventilation	
	telephone	
	intercom	
	other	
STORAGE	built-in	
	portable	
	storage room	
FURNISHINGS/ EQUIPMENT	fixed	
	display equip.	
	special	
MATERIALS	flooring	
	others	
LOCATION		
ACCESS	internal	
	external-people	
	external-goods	
OTHERS		

GRID 1

EDMONTON (R.C.) SEPARATE SCHOOL DISTRICT #7

● educational suitability assessment : FACILITIES ASSESSMENT

ASSESSMENT of

SCHOOL

planning area

space requirements		instructional spaces/non-instructional spaces
SIZE	capacity	
	area	
LIGHTING	natural	
	artificial	
VIEW OUT		
ACOUSTICAL PRIVACY		
SERVICES	water	
	electricity	
	gas	
	ventilation	
	telephone	
	intercom	
	other	
STORAGE	built-in	
	portable	
	store room	
FURNISHINGS /EQUIPMENT	fixed	
	display equip.	
	special	
MATERIALS	flooring	
	others	
LOCATION		
ACCESS	internal	
	external-people	
	external-goods	
OTHERS		

GRID 2

EDMONTON (R.C.) SEPARATE SCHOOL DISTRICT #7

INVENTORY of

- educational suitability assessment : FACILITIES INVENTORY

planning area

date prepared :

date revised :

SCHOOLS \ FACILITIES	elementary	elem./jr. high	junior high	E.C.S.	CLASSROOMS: primary	CLASSROOMS: upper elem.	CLASSROOMS: jr.high	SCIENCE: elem.	SCIENCE: jr. high	ANCILLARY	SOC. STUDIES	RESOURCE ROOMS	SPECIAL ED.			MUSIC	ART	HOME EC.	IND. ARTS	AUDIO VISUAL	LIBRARY	TEXT BOOK	GYMNASIA: elem.	GYMNASIA: elem./jr.high	GYMNASIA: jr. high	SHOWER/LOCKERS	LUNCH ROOM	KITCHEN	ADMIN. OFFICE	STAFF ROOM	STAFF PREP. ROOM	COUNSELLING ROOM	INFIRMARY	CUSTODIAL: office	CUSTODIAL: storage/equip.	STORAGE: supplies	STORAGE: outdoor equip.	WASHROOMS		PORTABLES	OTHERS	

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GRID 3

d) Review Secondary Factors for Suitability Assessment

Completion of the inventory of facilities in the planning area and the assessments of the spaces in terms of educational suitability should permit the Area Planning Team to identify the schools or portions of schools most suitable for the required programs. However, prior to selecting the spaces to be designated for educational purposes the Area Planning Team should review several other factors.

i) Accessibility

- review the accessibility of each school or portion of a school in terms of

external circulation
- is it barrier free?
- are passenger drop-off facilities available?

internal circulation
- is it barrier free?
- are all required program spaces barrier free?

washrooms
- are washroom facilities available?

ii) Site Development

- complete an inventory of

. recreational facilities
- playground equipment
- sports fields
- recreation potential of site

. vehicular facilities
- access for private vehicles
- access for disabled persons
- access for emergency vehicles
- access for service/ delivery vehicles

iii) Location of the facilities

- what is the proximity of the facilities to the place of residence ofthe students?
- what are acceptable travel distances for students?
- what modes of transportation are available

to the students?

- how convenient and safe are the traffic routes?

  do the students have to cross any major traffic arterials?

iv) Physical Condition of the Facilities

- review the maintenance and replacement records to identify the present conditions of the facilities and to predict required improvements to the facilities;

- complete energy analysis of the facilities to identify deficiencies of the building envelopes;

- project budgets for required remedial work if any, and ongoing maintenance and replacement.

v) Operating Costs

- obtain recent operating costs for each of the schools under consideration;

- project budgets taking into account any projected upgrading of facilities.

Upon completion of these inventories and analyses, the Area Planning Team will have available a data base by which it can establish the comparative advantages of the facilities and select the facilities to be used for the programs offered and designate space which is excess to the program requirements. Educational suitability should be the primary factor in selecting facilities for the educational programs. However, should there be no distinct choice in terms of the suitability of the spaces, accessibility, site development, location, physical condition and operating costs are additional factors to be reviewed in the selection process.

2. ANALYSIS OF FACILITIES RE: USE OF EXCESS SPACE

In the first phase the Area Planning Team identifies the facilities to be designated for educational programs and those to be designated as excess space. Having identified excess space, the next phase of the process is intended to develop a plan or program for the utilization of the excess space.

The adaptability and flexibility of school buildings to other uses will, in part, be dependent upon the characteristics of

the physical plant, and, in part, upon municipal planning controls and building codes which regulate development and uses on school sites and the adjacent neighbourhood. For purposes of analysis, adaptability has been defined as the suitability of the existing facilities for other uses without modifying the facility. This will be determined by room sizes, the compatibility of mechanical and electrical requirements (distribution and quality) of supplementary uses within the existing systems, the building code requirements in terms of types of construction, land use controls, and the location of the excess space within the school in terms of the requirement for access to the space and control over the space. Flexibility has been defined as the ease and/or feasibility of modifying the facilities and support systems and of amending the regulations and policies which regulate the types of uses.

As these definitions imply, the conversion of school space to other uses involves the review and analysis of several factors. It is proposed that the preparation of the plan or program for the utilization of excess space would occur at two levels. The Area Planning Team would be responsible for area wide planning and coordination and for providing information to the Neighbourhood Supplementary Use Committee. The Area Planning Team would provide base information such as the inventory and configuration of space in the planning area, the inventory of the facilities, Board policy and priorities to the Neighbourhood Supplementary Use Committee.

The Neighbourhood Supplementary Use Committees, established at the individual school level, would be responsible to identify local needs which could be met by use of excess space, to define the criteria for acceptance of potential uses, and to determine neighbourhood acceptance of the potential uses to be located in the available excess.

The following is a summary of the primary tasks of these two groups with regard to the analysis of facilities for supplementary users.

a) The Area Planning Team

Two of the primary tasks of the Area Planning Team include

i) Preparation of an inventory of the nature and configuration of excess space:

The nature and configuration of excess space will, in part, determine the types of activities that may be accommodated.

The inventory of excess space should include

- the type/types of spaces;

- the area of available space/spaces;

- the location of the spaces in the school including the relationship to other excess spaces, to support facilities such as washrooms, to entrance/exit facilities...

ii) Preparation of an inventory of the Building Systems of each school:

An inventory of the building systems should include the construction systems, the mechanical and electrical systems, and the building form and design. The attached inventory form provides an indication of the proposed scope of the inventory analysis.

The implications of these factors in terms of flexibility and adaptability are outlined in Appendix II, Chapter 4.

2. The Neighbourhood Supplementary Use Committee

The Neighbourhood Supplementary Use Committee would be responsible for developing a proposed plan or program of acceptable uses for the neighbourhood school.

The Area Planning Team through the Supplementary Use Officer, will be responsible for providing each Neighbourhood Supplementary Use Committee with the required base information such as Board policy and priorities, how much and what type of space is available, the characteristics of school construction systems and other required background information.

To fulfil its responsibilities, the Neighbourhood Supplementary Use Committee must be aware of the constraints or controls of development on school sites and must seek neighbourhood participation in defining needs and criteria for acceptable uses.

GRID 4

EDMONTON (R.C.) SEPARATE SCHOOL DISTRICT #7

- inventory of building systems and form

planning area | date prepared : | date revised : | of | systems/form

SCHOOLS	BUILDING DESIGN/FORM		BUILDING SYSTEMS		
			construction		
elementary	PLAN FORM	linear	STRUCTURE	masonry bearing	
elem./junior high		compact		post & beam	
junior high		court yard		wood frame	
	NO. OF STORIES	1	PARTITIONS	wd.fr. non-brg.	
		2		mas. non-brg.	
		3		wd.fr. brg.	
	WINDOW TYPE	window-wall		mas.brg.	
		vertical	LOWER FLOOR CONST	slab on grade	
		windowless		crawl space	
			mechanical		
				HEATING SYSTEM	
				VENTILATION SYSTEMS	
				EXHAUST SYSTEMS	
				PLUMBING FACILITIES	
				OTHERS	
			electrical	SIZE OF SERVICE	
				LIGHTING TYPE	
				EMERGENCY LIGHTING	
				FIRE ALARM SYSTEM	
				TELEPHONE	
				INTERCOM	
				OTHER	

V. ISSUES THAT MUST BE ADDRESSED TO ENSURE PLAN IMPLEMENTATION

A. ECONOMIC ASPECTS OF IMPLEMENTATION

The Direction by Design Process should result in a series of Area Plans outlining which spaces are best used for educational uses and which spaces are best used for supplementary uses, plus a series of Neighbourhood Space Use Plans outlining the best uses of excess space within particular schools and indicating the criteria for acceptability of supplementary uses. To implement such plans, several constraints must be examined by the School Board and its staff. This section suggests approaches to be taken in respect to economic aspects of implementation, constraints to implementation, marketing approaches, and details of leasing.

There are four basic aspects that must be taken into account to enable the district to lease/rent space to supplementary users:

- the costs of planning and administration;
- the capital costs of any required physical modification;
- the cost of maintenance and operation of the space;
- the capital costs of reconversion.

1. The COST OF PLANNING AND ADMINISTRATION

The management and operation of facilities for educational purposes is within the current mandate of the District. The Board's objectives for the use of excess school space suggest that the lease/rental of such space could also be considered within the mandate of the District. However, in order for the E.S.S.B. to carry out its objectives through the lease/rent of excess space to supplementary users, it will have to expand its actual functions. Working with Area Planning Teams and Neighbourhood Supplementary Use Committees in planning for the use of school space will be an expansion of District functions, as will the marketing of excess space to supplementary users. There is no doubt that this expansion of functions will result in additional costs to the District. In the long run these costs may be recovered by the District through rental rates. In addition, they will increase the district's utilization ratio, thus increasing the amount of provincial funding for the development of new schools. However, the District may not have the necessary funds when they are required - at the beginning. Therefore, it is proposed that the implementation year be considered a start-up year, and that planning, administration and marketing costs be covered by a special grant for this purpose. In the second, and each subsequent

year, the costs of planning, administration and marketing shall be recovered through the rental/lease rates charged for the space.

It is suggested that the additional start-up costs could include

- the cost of salary/overhead for the Supplementary Use Officer;
- the cost of establishing the Area Planning Team, and the cost of any planning sessions initiated by the APT;
- the cost of establishing the Neighbourhood Supplementary Use Committee, and any planning sessions initiated by the Neighbourhood Supplementary Use Committee;
- advertising costs/tender preparation costs;
- the cost of staff salary, and overhead to support the Supplementary Use Officer, Area Planning Team, and the Neighbourhood Supplementary Use Committee.

2. CAPITAL COSTS OF MODIFICATIONS:

a) Structural Modifications -(either to accommodate user or for code and/or licensing requirements)

It is suggested that the space must be available for a minimum of three years, before it would be considered suitable for use by a user who would have to undertake major structural modifications. Two types of term situations may occur, one in which the lease term is 3 - 5 years, and the other in which the lease term will be more than five years, probably 10 or more years. Three different situations that must be taken into consideration when determining the cost of modifications will exist because of the corporate nature of the user group. User groups will either be public corporations/agencies, non-profit corporations or profit corporations of some kind.

i) Public Corporations/agencies

3 - 5 Year Term: A government agency/corporation desiring three to five year leases, would likely be developing either an office, project office, recreation facility, social service facility, educational facility, etc. The public agency or corporation would probably have the funds to pay for the major modifications. Funding availability is not the main consideration for this type of corporation; rather, timing and final costs would be their main concerns. In some situations, the government department and agency will have to know the capital costs well in advance to ensure the

necessary budget allocation. It is probable that the public agency/corporation would want to make sure that the capital costs of their renovations were recoverable over a five year term and that additional tenant improvements were recovered over a three year period. If it were necessary for the Board to terminate the lease with the public corporation/agency prior to the end of the term, and if the cost of the renovations were not recovered by the corporation/agency, there would likely be some form of compensation required.

5 Year Plus Term: A public corporation/agency desiring 5 years or longer would probably be developing a group home, housing, residential care facility, health services, etc. This group of users would require the most extensive structural renovation of any type of user, and would have the funds to pay for the modifications. Cost and time are important factors for this group as well as compensation if the lease were prematurely terminated.

ii) The Non-Profit User

3 - 5 Year Term: A non-profit user would probably be providing either a public or private social, educational, recreational, cultural or religious service. Two types of non-profit groups exist; those who have or are able to raise the funds for the major modifications and those who cannot. In both cases, there will be a concern that the ongoing rental rates are well below market rate, even if the funds for modification are secured.

5 Year Plus Term: A non-profit corporation looking for this type of lease term would probably be developing a residential facility of some form, and obtaining funds for modifications by way of mortgage financing. In order to obtain this mortgage financing, it would be necessary to secure a minimum lease of 35 years. If a group could obtain funds that were not secured by a mortgage, they might be able to recover the costs in less than 35 years, and could accept a shorter term, depending upon the scope of the modifications.

iii) The Profit User

3 - 5 Year Term: A profit user wanting a 3 - 5 year term would probably be developing an office, retail or other commercial production use. A profit user should be able to pay for the modifications and tenant improvements. As with the public user in this situation, cost and recovery time would be of prime consideration and compensation would also be important, should the lease be terminated prior to end of the term.

5 Year Plus Term: A profit user desiring more than a five year lease could be developing retail, production or commercial

uses. While it is possible that such a profit user could be developing residential facilities, it would be unlikely that they would be interested in the conversion of a school to housing. It is probable that the profit user would want to recover the cost of the modifications and tenant improvements on the same time frame as if he were in a 3 - 5 year lease.

b) Who Should Pay

With the exception of the non-profit user, who has difficulty raising funds for modification, all other potential users can pay for the cost of modifications, provided that the cost of modifications, tenant improvements, the base rental and the operating costs, over a five year period, do not exceed the market rate for similar accommodation. With the groups that can pay, the Board should adopt a user pay policy.

A mechanism should be included in the lease to provide for compensation to the users should the lease be terminated prior to the end of the term for reasons other than a breach of the terms of the lease by the user, or the user giving notice. Such a buy-out provision should be based upon a predetermined recovery rate for the modifications and should take into account the current differential between the effective rental rate of the user's space and comparable space in the city. If, for example, the predetermined rate of recovery was $2.00/sq. ft. per year; and the total rental rate for the space, including modifications, base rental and operating cost was $12.00/sq. ft./year for the current year, and the market rate for similar accommodation exclusive of tenant improvements had been $20.00/sq. ft. per year for the past three years, and there were two years remaining in the term, the user would not be entitled to any compensation. However, if the market rate for similar accommodation was $12.00, then the user would be entitled to compensation equal to $2.00/sq. ft. for the balance of the term.

For non-profit or community based groups who cannot raise the funds for the modifications, the Board should seek funding from other than the user, e.g., the Building Quality Restoration Program 1978 - 83. The funds that the Board is unable to raise through a program such as this would be paid by the Board and charged back to the user over the term of the lease. This would ensure that the user would be able to gain access to the necessary capital renovation funds while retaining the advantages of long term, low rate, rent/lease fee. Since the Board rather than the user contributed any additional capital funding, there would be no need for compensation to the user, should the lease be terminated prior to the end of the term.

c) Tenant Improvements

A distinction must be made between tenant improvements and

other modifications. Tenant improvements do not include the cost of modifications necessary to convert a facility designed for school use to a facility suitable for a subsequent use. For example, tenant improvements in a space converted from school use to office use, would not include the installation of a telephone system but it would include the cost of the placement of telephones in the offices. In other words, tenant improvements are the additional modifications made to a space already altered to serve a new function to ensure that the space adequately meets the particular needs and requirements of a specific user.

Because of this, it is thought that all users regardless of circumstance and term of lease should be responsible for paying for their own tenant improvements.

As with major structural modifications, a process should be developed to allow for tenant compensation in the case of early lease termination.

3. THE COST OF MAINTENANCE AND OPERATIONS:

a) Maintenance and Replacement

The following chart outlines different options for assigning responsibility for cost of maintenance and replacement.

TERM	MAINTENANCE	REPLACEMENT
less than 1 year	Board	Board
1 - 3		
(partial school)	Board	Board
(complete school)	User	Board
3 - 5		
(partial school)	Board	Board
(complete school)	User	Board
5 Plus		
(partial school - minor modifications)	Board	Board
(partial school - major modifications)	User	User-for user's modifications Board - for school facility
(complete school - minor modifications	User	Board
(complete school - major modifications/ conversion, e.g. housing)	User	User

All maintenance costs should be charged back to the user, by way of the monthly rental/lease fee. In order to meet the user's requirement for a pre-determined monthly lease fee, a per square foot maintenance cost estimate should be established each year.

Replacement, unlike maintenance, cannot be charged back to the user, since the economic life of the replaced item, will usually exceed the life of the lease. An amount equal to the user's portion of the economic life could be charged back to the user. However, since replacement is often unpredictable, such a charge could result in an erratic and irregular rental/lease fee that would be difficult for the user to budget for. Instead, included in the monthly rental/lease fee should be a sum to cover the establishment of a replacement reserve to be used for building replacement costs. While the replacement reserve would not cover the total cost of any replacement, it should cover the user's portion of the economic life of any necessary replacement during the term of the user's lease.

b) Other Operating Expenses

Where physically possible and economically feasible, separate metering systems should be established for the supplementary users. Thus, utilities, such as power and water, would be charged directly to the user based upon their usage. In a school completely used by one user, all utility costs should be billed directly to the user. In situations where there is more than one user, and where it is not possible to arrange for separate metering, the Board should establish a charge to cover the cost of utilities to be included in the monthly rental/lease fee. Schools with supplementary users should be monitored to determine whether or not the flat rate fee schedule is covering the cost of utility usage, and whether different users should be charged different fees.

c) Fee Exemptions

There are a number of community based non-profit groups to whom the Board currently provides space at no charge. If these groups were not able to obtain this free space, they would not be able to operate their programs. Since in most cases these services fall within the objectives of the E.S.S.B. for the use of school space, it is suggested that the Board continue the practice of exempting these community based non-profit groups. If the Board continues charging all other users a proportion of the debenture repayment, and if the Province continues not deducting the balance remaining on debentures for acceptable users, the unclaimed funds from the province should offset the provision of free space to certain users.

B. BUILDING CODE COMPLIANCE OF SUPPLEMENTARY USERS

With respect to Building Code compliance, the diversity of construction systems and of potential uses, requires that each school, or portion thereof, be reviewed in terms of the specific use or uses proposed for the excess space.

Upon completion of a code review, the potential occupant will be responsible for advising the Supplementary Use Officer of the required modifications to ensure code compliance.

Although the potential occupants are to be responsible for modifications required to comply to code, the Supplementary Use Officer, the Neighbourhood Supplementary Use Committee and other representatives of the Board should assess the scope of the proposed modifications.

The proposed modifications should be assessed to identify

- the disturbance and inconvenience to other users during and after construction;

- the impact on the flexibility and adaptability of the facilities for subsequent users;

- the implications for reconversion to educational facilities.
  These and other issues identified would be evaluated in deciding if a use would be an acceptable tenant and in establishing the conditions of the lease.

C. MARKETING EXCESS SCHOOL SPACE

Within the framework of the objectives and policy principles, established by the E.S.S.B. and the suggested planning process, the following marketing procedure is suggested:

1. All marketing of excess school space shall be done by the Supplementary Use Officer in Central Office.

2. A target group marketing approach shall be used. The Supplementary Use Officer responsible for marketing, shall attempt to find groups for particular schools within the framework of Board policies and the range of acceptable uses established by the Neighbourhood Supplementary Use Committee, as well as the time constraints for the disposition of the school space established by the Area Planning Team.

   As the public becomes more aware of the availability of school space, they will likely contact the Supplementary Use Officer, who can maintain a list of potential users, and as space becomes available, match the potential user with suitable space. However, there may be a point when a waiting list of suitable users does not exist, or when the Supplementary Use Officer may want to seek out suitable users. In this instance, an active rather than reactive approach to marketing is necessary and the Supplementary Use Officer may want to advertise that the District is looking for potential users for their excess space. Potential users responding to an advertising process should be required to contact the Supplementary Use Officer prior to making an applicationfor use of the space.

   The Supplementary Use Officer should provide interested applicants with

   - a list of available space in one or more areas, and the Area Planning Committee's guidelines regarding leasing/term.
   - the Board's objectives and policy principles with regard to the use of excess space.
   - the Neighbourhood Supplementary Use Committee's criteria for acceptable uses.
   - a copy of the Board's policy with regard to modifications.
   - an outline of the possible application requirements.
   - an estimate of the base rental (cost/sq. ft.)
   - a copy of the application form.

CHAPTER FOUR

: CONCLUSIONS & RECOMMENDATIONS

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: CONCLUSIONS & RECOMMENDATIONS

The review of the experience of other jurisdictions indicated that the disposition and use of excess space is a new problem for school administrators, a problem addressed cautiously at first, but one which demands to be addressed more and more urgently. The case study of the situation in the Edmonton Separate School District confirms this finding, as does it confirm a number of the important issues which were identified as common to those districts which have had any success in approaching the problem. A brief review of those common issues will provide an appropriate context for recommendations to all parties affected by excess school space in their efforts to deal with the problem.

The first major observation of the study, was the degree to which most jurisdictions had been caught off guard by the problem. Efforts to deal with the excess space have been largely trial and error, resulting in solutions which we have described as generally conservative. Those jurisdictions which seem to be at the forefront of efforts to solve the problem, seem to be those where the problem appeared earlier or more abruptly than in other areas. Many of these experienced considerable difficulties in their early attempts at solutions, particularly opposition to those solutions from neighbouring communities. Such districts as Seattle, Highline, Atlanta, Arlington, State of California, Toronto, and Hamilton, Ontario led the way in initiating studies to analyze more exactly the nature of their problems and to identify a broad range of solutions which would be acceptable to their communities.

Common to most of those districts which have appeared to find acceptable answers to the questions raised by excess space, is a view of the role of the school district as being chiefly that of educator. However broadly education itself is defined, these districts seem to see their efforts in managing excess space as being efforts to maintain, or indeed, to raise the standard of education available to their community. Uses other than educational uses are generally seen as supplemeniary to educational uses; that is, these other uses are seen as adding something to the primary educational purposes either by adding enriched environments (such as museums, art galleries, special classes), enriched human environments (such as services for the elderly, handicapped, housing, etc.) or by adding extra revenue to support the primary educational purposes. In this respect, the goals adopted by the ESSB are a typical, and particularly good, example of this prevailing concern.

> ***Education - is a process designed to provide tools, information, skills and methods which enable the learner to know/learn about self and universe on both a practical and a philosophical/spiritual level.***

School space shall be used

1. to enable the education of K - 12 students.

2. to enable provision of educational opportunity to a broad range of the community beyond the K - 12 system.

3. to enable the broadening of the range of education programs and activities both within and beyond the K - 12 system.

4. to ensure the long-term integrity of the Edmonton Separate School System.

5. to provide a physical resource to

    a) students/teachers
    b) the parent/ratepayer community
    c) the adjacent neighbourhood
    d) the city as a whole

These goals not only indicate the central position of education in consideration of the possible uses for school space, but also draw attention to the third observation which seems to be common to those jurisdictions in which this problem has been addressed successfully; that is, the community. Teachers and students are not the only people affected by excess school space and changes in the use of that space. The neighbourhoods adjacent to schools are deeply affected by such changes, not only negatively where schools are closed or programs abandoned, but more important, very positively where an exciting, innovative approach to supplementary uses has provided the focus for the rejuvenation of whole neighbourhoods. Entire municipalities can be similarly affected by the approach their school boards take to excess space and supplementary use. And, of course, entire provinces or states may be affected, both because the quality of education provided within their jurisdiction is affected, and because their budgets are highly vulnerable to the needs of education, particularly in respect to the capital funding of school facilities. The problem of excess space, then, is a problem which reaches well beyond the classroom walls. It is a problem which demands the attention and involvement of school districts, municipalities, and the province, as well as the teachers, students, parents and neighbours of the schools.

The final critical observation common to other jurisdictions and the Edmonton and Alberta situations, is that there are real and limiting physical, economic, legal, and neighbourhood constraints to effective management of excess space. None of these constraints is unresolvable. But all parties to those constraints must be determined to find the most suitable solutions, and must work together to implement them. The following material makes a number of recommendations for ways of addressing some of the constraints in the Alberta context:

I. RECOMMENDATIONS TO SCHOOL DISTRICTS

A. NEED FOR COMPREHENSIVE PLANNING

While the primary mandate of school districts is the delivery of education, it is suggested that the management of space, which is considered excess to the educational needs of a district, be considered within the mandate of the district as long as this excess space is used in ways supplementary to the education program. A particular district may be motivated to use its excess space in order to retain land for future educational use, to retain a facility which may be needed in subsequent years, to increase its utilization factor, and consequently, its future capital funding for new schools, to create a resource available to the community at large, to generate additional revenue for its existing programs, or to develop a broader range of educational programs. Any of these motivations, and many others in fact, are legitimate reasons for school districts to get into the business of managing excess school space. Regardless of the motivation, however, it is important that a district setting out to manage excess space understand that this entails management of space for educational purposes. As illustrated in the E.S.S.B. Case Study, a district which adopts a comprehensive space/facilities management program, can direct and control the nature and configuration of space available for both educational program purposes, and for supplementary uses, thereby ensuring that the spaces most suitable for each type of use are indeed available to that use.

1. RECOMMENDED that school districts with excess space or potential excess space develop a comprehensive strategy for the management of educational space and facilities.

B. NEED FOR PARTICIPATORY PLANNING PROCESS

For reasons detailed in Chapters One and Three of this study report, it is clear that space management is not a problem confined to the school authorities. The effects of decisions about excess school space have far reaching impacts on the larger community. Those school districts which have tried to manage their excess school space in isolation from the community have had little success.

Potential participants include:

<u>Educators</u>

School district administration - including program area
Specialists
Superintendents

Principals
Teachers

Citizens

School Board
Parents
Neighbourhood Groups
Students
Potential Users

Other

Existing Supplementary Users
Municipal Agencies which may share space, and planning agencies
Provincial Agencies

1. RECOMMENDED that school districts adopt a decentralized approach to management, involving in a real and substantial way, all those affected by decisions about the use of school space. Such a decentralized approach is described in Chapter Three as a direction by design planning process.

C. DETERMINATION OF EFFECTIVE EXCESS SPACE

A school district must determine for itself what excess space it has that might be available for supplementary users. To be effective excess, this space must be definable and separable. It appears that, for the purpose of establishing effective excess space, the School Needs Formula is more suitable than the Provincial Utilization Formula.

1. RECOMMENDED that school districts use the School Needs Formula, or some modification of such, for the determination of potential effective excess space, recognizing that using a formula other than the Provincial Utilization Formula may impose certain costs.

D. IMPLICATIONS FOR CAPITAL FUNDING

Since a school district using the School Needs Formula might be considered underutilized by the Provincial Utilization Formula, and hence, receive less capital funding for new buildings, implications for the district in terms of potential loss of capital funding should be reviewed.

1. RECOMMENDED that a school district, using the School Needs Formula to determine its effective excess space, take into account the potential financial implications of possible underutilization of existing school facilities.

2. RECOMMENDED that while developing its strategy for the management of excess school space, the district consider ways of using its available facilities more efficiently, in order to provide adequate delivery of educational programs within available funding.

E. POLICIES FOR THE USE OF EXCESS SPACE

In order to determine appropriate uses of excess space, school districts must first establish their goals and objectives with regard to the use of school facilities. These goals and objectives then form the base for establishing the needs and requirements of a district, as well as the acceptability of potential supplementary users. While both the goals and objectives, as well as the needs and requirements of a district, may limit the range of supplementary users, educational needs and requirements of the district must have priority over other activities.

1. RECOMMENDED that the first step in a district's development of a strategy for the management of educational space and facilities, be the development and adoption of goals and objectives to guide that strategy.

II. RECOMMENDATIONS TO MUNICIPALITIES

A. FLEXIBILITY OF LAND USE POLICIES

As outlined in the Stage I - Interim Report, municipalities can limit or broaden the range of possible uses of excess school space through their land use controls. If a municipality's land use by-law does not include most potential users of excess land within the range of permitted or discretionary uses allowed in the land use district which includes school lands and buildings, then this will effectively limit the range of uses a school district may realistically explore.

1. RECOMMENDED that municipalities adopt land use by-laws, which include as discretionary uses in land use districts which include school lands or buildings, any use which meets the general purpose of the land use district, which complies with any Statutory Plan, which is compatible with the character, form, and integrity of the neighbourhood, and which meets the criteria of a school's plan for supplementary uses.

B. SUPPORT FOR COMMUNITY FACILITIES

As indicated earlier, municipalities and neighbourhoods in which there are effective supplementary use programs in the schools often experience an overall revitalization of entire communities, as well as a general upgrading of community facilities.

1. RECOMMENDED that municipalities actively support school districts which pursue effective supplementary use programs, and further, that municipalities, where appropriate, enter into agreements with such school districts for provision of community facilities.

C. COMMUNICATION BETWEEN MUNICIPALITIES AND SCHOOL BOARDS

When either a Municipality or a School Board is developing plans or policies for the future, they should be fully informed of the plans and policies of the other authority. E.g., the land use policies of a municipality may influence the enrollment at local schools; the school facilities may comprise a major component of the recreational facilities in a neighbourhood. Therefore, when preparing statutory plans or land use by-laws, a municipality should be aware of the Board's plans for the future of its facilities. Likewise, in

establishing the future need for educational facilities in a neighbourhood, a School Board should be aware of any proposed modifications to municipal development controls.

1. RECOMMENDED that municipalities offer to participate in the planning process adopted by a School Board to develop a strategy to manage excess space and that municipalities develop procedures to inform School Boards of any anticipated changes to plans and land-use controls.

III. RECOMMENDATIONS TO ALBERTA EDUCATION

A. FACILITATION OF THE USE OF EXCESS SPACE BY SUPPLEMENTARY USERS

As we noted in the review of the experience of other jurisdictions, lack of information is a critical barrier to the creative disposal of excess space. Although Alberta Education has created an incentive program for the use of excess school space through its program for capital funding, the disposition of such spaces by many school districts has been done on a temporary, ad hoc basis, rather than on a planned basis and as part of an educational facility management program. Using the material provided by this study, Alberta Education has the basis for developing an information program to encourage and assist local school districts to plan for disposition of their excess school space.

1. RECOMMENDED that Alberta Education establish an information dissemination program with regards to planning and possibilities for the use of excess school space.

2. RECOMMENDED that Alberta Education become the clearing house for information about the experience of other jurisdictions in managing excess school space. Information gathered could include both general experiences and specific material, such as districts' goals and objectives for the use of space, leasing policies, marketing techniques, administrative procedures and documentation, nature and cost of modifications for different types of clients, etc. This information could be available, on a request basis or through a periodic information publication.

B. COMPREHENSIVE SPACE PLANNING AND MANAGEMENT

1. START-UP PROGRAM

There are costs involved in planning for, marketing and managing excess space. These costs will be higher in the initial or start-up year when a district may not be generating any revenue to offset these costs. It is suggested that as an incentive, as well as a method to enable districts to effectively manage their excess space, there is a need for a first year start-up funding program. The costs of such a program could be borne by Alberta Education. It is suggested that such funds would enable a district to develop a five year plan for the use of excess space, and to undertake all the necessary work during the first year, with regards to plan implementation. After the first year, any costs associated with the management of excess space, should be assumed by the school district from the rental/lease rates charged to supplementary users. These start-up funds would be available for jurisdictions which have the in-house (technical/personnel) resources to undertake either part or

all of the planning and first year implementation process

1. RECOMMENDED that Alberta Education establish a one year start-up program to enable a school district to plan for the use of excess space.

2. TECHNICAL SERVICES

It was concluded during the research and analysis for this study, that the preparation of policies and plans for the use of excess space requires the access to technical support at various stages. For example, technical services will be required to enable a jurisdiction to

- identify the scope of the problem;
- organize the planning process;
  . develop methods of involving the affected parties;
  . define goals and objectives;
  . define jurisdictions and tasks of the participants.
- collect and analyze data;
- develop policies and plans;
- develop management plans;
- monitor the situation to review and revise the policies and plans.

There are a variety of forms of local administration of educational programs and a variety of sizes of school districts within the province, including

- the school district, with elected trustees responsible for setting educational policies and programs and with administrative staff and educational staff responsible for implementing the policies and programs.

- the County in which the elected representatives are responsible for both municipal and educational local government. The elected representatives establish educational policies and programs. As with the school district, the County employs administrative and educational staff to implement the educational policies and programs.

School districts may be responsible for the educational programs of an entire urban centre, as for example, the Edmonton Public School District #7, or the Edmonton Separate School District #7, both of which are in the City of Edmonton. Conversely, a school district may be responsible for the educational programs within a sparsely settled rural area. Consequently, not all school districts have the technical expertise or staff to undertake a plan for the use of excess space, or because of the small number of schools within the district may not be able to support/justify the need for the technical staff required. Therefore, to ensure that every school district within the province, regardless of size, staff, or location, has the capability to cope with the problem of excess space, when and if it occurs, it is suggested that there should be a technical support service that these

districts can utilize as required.

It is intended that Alberta Education provide the technical service only, and that local autonomy be protected. The local elected representatives would remain responsible for defining and adopting the goals and objectives for local programs, and for all decisions throughout the planning process.

The Planning Services Division of Alberta Municipal Affairs provides a model for such a service. The Division assists local municipalities in developing the various statutory plans and land use by-laws which are enabled by The Planning Act, 1977. Further, it provides technical services in the form of data collection and analysis; as well as drafting of potential by-laws. However, the local government defines the goals and objectives of the planning legislation, provides direction in the drafting of the by-law, and is responsible for the adoption and implementation of by-laws. The Division is limited to providing technical services, and to acting as advisor concerning experience in other jurisdictions, or the probable consequences of particular decisions. The local government remains the decision-making body.

As with the start-up program, it is suggested that Alberta Education provide this service to the district in year one - the start-up year - with no charge. In future years, it is suggested that this service be charged to the district on a use basis, and that the cost for this service be built into the annual lease/rental fees, if this is at all possible.

1. RECOMMENDED that Alberta Education, through its Planning and Research Branch, establish technical support services for local school districts. Areas of service could include

- preparation or assistance with enrollment projections and analysis of enrollment patterns;
- advice on organizational structures for the planning process;
- information about techniques to encourage participation of affected parties, as well as planning process techniques and methodologies;
- analysis of existing facilities in terms of the adaptability and flexibility, suitability for educational programs, and implications of maintenance and upgrading requirements;
- identification and analysis of local and regional development trends;
- information on potential user requirements;
- information on marketing of excess space.

2. RECOMMENDED that technical support services be provided to school districts without charge in year one of the district's program. In subsequent years, it is suggested that this service be charged to the districts on a use basis, and that the cost for the service be built into the annual lease/rental fees collected by the districts from supplementary users.

3. CAPITAL ASSISTANCE FOR MODIFICATIONS TO CONVERT TO A SUPPLEMENTARY USE

While most potential users will be able to pay for the capital cost of the modifications necessary to enable their use of a school facility, some non-profit community based groups are unable to do so. These groups are often not in a position to secure capital funding necessary for the modifications. The Building Quality Restoration Program 1978-83, while not directed towards this type of capital funding, has been used to assist a district to undertake the necessary modifications to enable a non-profit user to make use of the school.(e.g. the daycare developed in St. Vincent School, Edmonton). While the Building Quality Restoration Program only covers approximately 80% of the costs of modification, it does nevertheless have the possibility of allowing access to school facilities to some groups who might not otherwise be able to raise the necessary capital funding. Since many of these groups are able to obtain operating funds, the costs not covered by such a program could be included in the monthly rental rate charged to the group, provided, of course, that such costs do not result in a higher than market rental/lease rate.

1. RECOMMENDED that the Building Quality Restoration Program 1979-83 be extended to include the cost of modifications necessary to accommodate non-profit community based users who are unable to raise the capital necessary to cover the cost of such modifications. It is also recommended that the use of funds for this purpose be monitored, and if the need exists, the Program (for non-profit user modifications) be extended beyond 1983.

4. THE COST OF RECONVERSION

While not an issue at this time, the cost of reconversion could become an issue within the next five years. It is difficult at this time to predict the magnitude of the costs and problems involved with reconversion, as these will be dependent upon the modification required to accommodate the supplementary users, the age and structure of buildings, as well as the particular facility requirements at the time of reconversion.

It is quite possible that a district might require capital assistance to undertake the reconversion back to school uses.

1. **RECOMMENDED** that Alberta Education undertake a review of the problems and costs of reconversion prior to 1985, to determine whether there is a need for the development of a special program to assist with the reconversion of school facilities.

C. PROVINCIAL LEGISLATION AND REGULATION MODIFICATIONS

1. THE SCHOOL ACT - ACCEPTABLE USERS

It is important that a school district know in advance the range of users that would be acceptable to the Minister, thereby ensuring that its marketing procedures result in acceptable users of excess space. Since it is difficult to list exhaustively all the possible users of excess space, it is suggested that criteria be established for acceptable users. Then any user which met the criteria would be considered by the Minister as an acceptable user.

Section 93 (2.1) of The School Act enables the development of regulations exempting any class or type of space from requiring Ministerial approval prior to disposition.

1. **RECOMMENDED** that the following addition be made to the current regulation 71/77 pursuant to Section 93 (2.1) of The School Act:

A school district may lease or rent any real property or buildings or portions thereof for use by a user who

1) is acceptable to the school district, and

2) is acceptable to the municipality, meaning that the user is able to obtain the necessary development permits, and

3) is acceptable to the adjacent community, meaning that the user meets criteria established in a school's plan for supplementary use;

without having to obtain Ministerial approval.

2. THE SCHOOL ACT - MARKETING PROCEDURES

Sections 93 (3), (4), (5), and (6) prescribe a marketing procedure for the disposition of any real or personal property whose value exceeds $1000, or is likely to be disposed of for a value exceeding $1000 to all potential users except those exempted in Section 93 (7) of The School Act.

While in some instances, a district may require the type of marketing procedure decribed in these sections, a district should have the flexibility to develop and implement a variety of marketing strategies in order to encourage a broad range of supplementary users.

1. RECOMMENDED that Section 93 (7) be amended to include any of the users exempted by the Minister by regulation pursuant to Section 93 (2.1) of The School Act.

3. THE SCHOOL BUILDINGS REGULATIONS - SCHOOL UTILIZATION

The School Buildings Regulation Section 3.(2)(e) provides an incentive to districts leasing/renting excess space to acceptable users, by allowing such leased/rented space to be included as a deduction when establishing the operating capacity of a school facility. The ability to use this deduction may be extremely beneficial to a school district that has a number of excess spaces that can be leased, and at the same time needs to develop additional school facilities. To ensure that school districts do receive the benefits intended by this regulation, it is necessary to ensure that a district receive an exemption for all spaces leased or rented to uses acceptable to the Minister under the addition to Regulation 71/77 suggested above.

1. RECOMMENDED that Section 3.(2)(e)(iii) be interpreted to mean any user exempted pursuant to the addition suggested above to Regulation 71/77 eliminating the necessity for prior Ministerial approval for disposition of any class of real property or land.

4. THE SCHOOL BUILDING REGULATION - FINANCIAL SUPPORT

Section 11(4) of The School Buildings Regulation empowers the School Buildings Board to reduce financial support for a school building project if the school building has been closed or disposed of, and the school building project still applies. It has been suggested by a representative of the School Buildings Branch, that this section of the School Buildings Regulation would not be operationalized if the

supplementary users were non-profit users, but might be used if the supplementary user were a profit making group.

This concern, while legitimate, raised a number of problems. If the reduction of financial assistance were imposed for private/profit potential users, this could act as a deterrent to a board in terms of seeking out other than non-profit users for its space. While at the present time there seem to be enough non-profit users interested in school space, this may not always be true. Since most of the profit user groups would have to undertake major modifications to convert school space to a supplementary use, their initial and pro-rated lease costs would likely be high. In addition, many of the existing schools, because of age and design, may have high operating costs. When these factors are combined with the potential cost of tenant improvements, it is quite possible that even without a monthly lease fee to cover the cost of debenture repayment, the rentals for the space might be close to the high end of market rentals. The district could find itself in a position of not being able to rent its space to private/profit users because the effective lease rates would be too high compared to the market.

On the other hand, a district which is able to charge a cost plus profit for its space to a private/profit user because the effective rate for the space including renovations/tenant improvements, operating costs and the base rate charged by the district - is below market, could be viewed as unduly profiting from the situation, especially if the School Buildings Board does not exercise its powers to reduce funding.

A school district should have the flexibility to seek out a broad range of potential supplementary users. At the same time, however, the School Buildings Board should have the assurance that a district is not unduly taking advantage of the situation.

1. **RECOMMENDED** that a school district leasing/renting excess space establish a special account for income and expenses with regard to the leased/rented space, and that the School Buildings Board only exercise its discretionary powers with regard to a reduction of financial support for a school buildings project, when and if it establishes that a district has unduly profited by the situation.

2. **RECOMMENDED** that the School Buildings Board, in consultation with existing school districts, establish acceptable income/expense ratios to be used as the basis for determining undue profit.

5. CLASS SIZE AND THE UTILIZATION FACTOR

It is assumed by the Province when establishing the utilization factor for school districts (when such is applicable) that elementary and junior high classes are organized into groupings of 25 full time equivalent enrollments who then require a classroom. Unfortunately, however, in many instances this is neither possible nor practical. In the case of Early Childhood Services, for example, while there might be 25 enrollments in the program, they would be only half-day enrollments. Because of the specialized nature of the E.C.S. program, it is not practical to use the E.C.S. room for other purposes when it is not being used for the E.C.S. program.

Because of the special needs and requirements of the students in special programs such as E.M.H. and T.M.H., these classes are organized into groupings of 8 or less students. Unlike the E.C.S. students, these students are full time equivalent enrollments. However, like the E.C.S. students, they are considered to be underutilizing school facilities.

The need to satisfy both the students' educational requirements as well as the province's concerns with regard to utilization may present districts with difficult problems.

The dilemma then is to ensure that school districts use their existing facilities in the most effective manner while also meeting the special program requirements required.

1. RECOMMENDED that Alberta Education consider establishing special class size standards for special programs such as ECS, EMH, TMH, etc., that take into account the particular nature and requirements of these programs.

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